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for automotive jobbers, warehouse distributors and their salesmen

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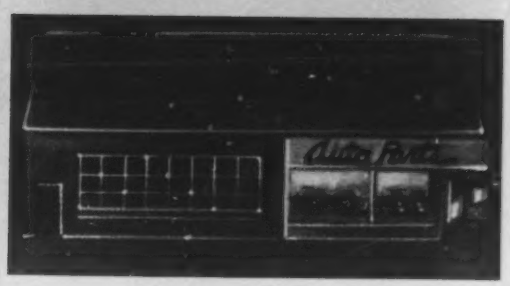

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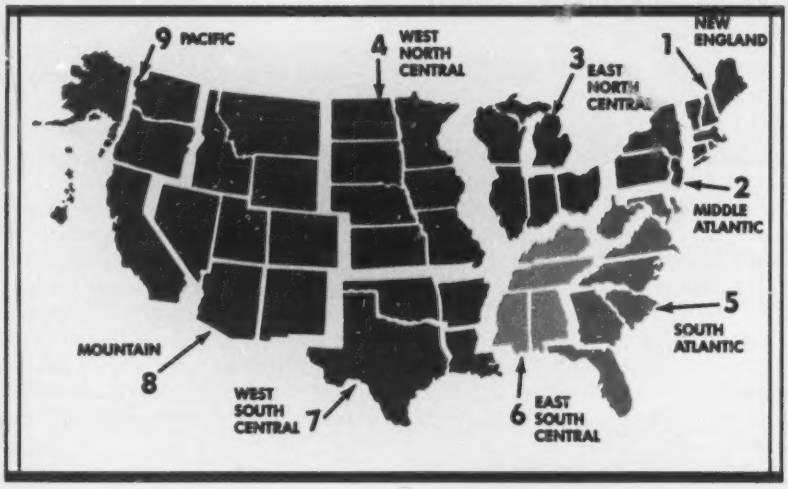
New Trend Detected in Jobbers' '88 Sales Reports?

Not since the last national election have any of the annual business figures reported to us by jobbers looked so good. But they also give reasons for continued growth...

By JOSEPH PETKUS
Research Editor

Hovering around 2,000 most of the year, the Dow-Jones Index dropped 60 points in two days as this analysis was being written, but uncertainties on Wall Street apparently are having little impact on the automotive jobber. Although televised news coverage these days tends to relate everything to the coming national elections, politicians—and their proliferation of hoopla—do not seem to be hindering our jobber panelists' current unit sales and dollar sales figures, both of which are notably higher than last year's. Interestingly, while 1988 sales percentages closely resemble those of the previous national election year, collections and cash position as currently reported look much better than the 1984 statistics.



In fact, taken as a whole, the present data are the best in this decade, and comparisons to the 1987 numbers suggest a turnaround in the industry within the past 12 months. The current survey shows an *improvement in all* of the nine reporting *regions*. Jobbers in general have been doing so much better that, since last year, figures for improved dollar sales have risen by over 50 percent in seven of the nine census regions!

Furthermore, the national (All Regions) figure for improved dollar sales is higher than that of 1987 by approximately 82 percent. Currently, 59.7 percent of all survey respondents noted that dollars sales are up over a year ago, while only 32.8 percent of those responding to our previous survey reported rising dollar sales. The most remarkable rise in dollar sales came from Region 3 (East North Central) with 68.1 percent reporting improved dollar sales (compared to 33.3 percent in 1987).

Over 420 automotive parts jobbers representing a national cross section of the industry replied to this survey. This year, we asked respondents to compare their business for the first four months of 1988 with the first four months of last year. To implement *JT's* annual "How's Business" study, our questionnaires inquire about how things stand with respect to five basic matters: unit sales, dollar sales, local markets, collections and cash position. We also encourage comments from our panel.

The respondents' questionnaires are divided into nine regions—conforming to those established by Uncle Sam's census takers—to provide a more-detailed picture of local conditions. As usual, the panelists' comments also offer extra insight into the direction of the aftermarket. For example, a jobber from Iowa reported, "We are in a farming area. Things are looking up; the tension is easing a lot."

"I find it hard to believe that our customers charge up to $50/hour labor and can't pay their parts bills," a New York State jobber noted. "Business is so competitive that when we place a past-due account on C.O.D., we lose

the account. The only reason business is up is that we call on more accounts than ever before. Most of our accounts had a dismal first quarter. I hope for a better second quarter." Of our respondents who reported improved dollar sales, 42.8 percent noted that garages and shops contributed to the sales increase more than any other class of trade, but several other jobbers also commented on problems with collection and competition.

According to a jobber from California, "During the past 12 months, slow-paying accounts have been weeded out. All accounts left unpaid for more than 45 days are placed on C.O.D. Outside sales were the main reason for an increase in business."

From an Oklahoman, we learned, "Mass merchandisers are ruining the market for the small jobber! They sell inferior products at cut-rate prices, or sell the same products I have at a price I purchase the item for. It gets harder and harder every year to preach quality versus cheap prices; most people don't want to hear this any more. All the mega-dollar ads every week in the paper with 'rebate' prices, and/or something as ridiculous as a 'lifetime warranty' are hard to contend with." Over 26 percent of those jobbers who reported that dollar sales were up, however, attributed the increase primarily to their retail trade.

Perhaps the most typical of all our respondents was the jobber from Ohio who wrote, "More work, greater volume, consistent service and volumes of paperwork are necessary to show the same profit as last year." Yet the statistical evidence also confirms that jobbers are making an improved effort worthy of success. Nationally, 43.4 percent of the respondents to this survey report their cash position is better today than 12 months ago, while only 15.1 percent state that cash position is worse than in 1987. These figures compare most favorably to those of last year, when 25.3 percent said their cash position had improved, but 27.9 percent noted that they were in a weaker cash position than they had been in 1986. On a national scale, jobbers are also doing better in collections than they were a year ago, although the improvement is less dramatic.

Currently, 17.1 percent of our respondents report that their collections are up in the last 12 months (compared to 11.9 percent so responding in 1987), and 13.2 percent note collections are down relative to last year (as opposed to 22.0 percent in 1987). Slight as it may seem, this improvement in collections over a twelve-month period is a record for the 1980s. Second-best was the comparison of 1984 to 1983 percentages, which showed 17.2 percent of the 1984 respondents reporting collections were up and 27.3 saying they were down (compared to 12.4 percent up and 32.0 down in 1983).

Jobbers also seem to have entered the second half of 1988 with the strongest cash position of the decade. Not since 1984 has the percentage of jobbers reporting a better cash position outnumbered those reporting a worse one. At that time, 29.0 percent of the respondents said their cash position was better than in 1983 and 15.0 percent said it was worse.

Just as there have been excellent reports for dollar sales and cash posi-

Compare the first four months of 1988 to the first three of 1987

(Percent total respondents)

Dollar sales	Region 1	Region 2	Region 3	Region 4	Region 5	Region 6	Region 7	Region 8	Region 9	All Regions
Up	52.0	51.6	68.1	59.3	59.3	53.1	35.7	68.0	75.0	58.7
Down	24.0	21.8	12.5	13.6	22.0	12.5	23.8	12.0	12.5	17.1
Same	24.0	26.6	19.4	27.1	18.7	34.4	40.5	20.0	12.5	24.2
	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Percent "up"										
Average	10.5	9.5	10.8	13.2	11.4	12.7	16.7	19.0	15.4	12.8
Median	9.0	10.0	10.0	10.0	10.0	10.0	10.0	10.0	12.5	10.0
Percent "down"										
Average	10.7	14.1	13.3	8.6	15.8	6.0	16.9	20.3	11.3	13.4
Median	10.0	10.0	8.0	7.5	13.5	6.0	17.0	10.0	10.0	10.0

New Trend Detected in Jobbers' '88 Sales Reports?

"Not since 1984 has the percentage of jobbers reporting a better cash position outnumbered those reporting a worse one."

tion, so is the last word on unit sales encouraging as well. Unit sales are up according to 51.1 percent of our respondents and down according to only 19.5 percent; while a mere 26.3 percent of those responding to our 1987 survey noted an improvement, 38.3 percent said unit sales were down compared to 1986.

Good news has come to us from both industrial and agricultural areas and all regions of the country. Because there are so many parallels between the percentages reported this year and those in 1984, reflections on the role of government's impact soon follow. Is there an incumbent politician who wants to take the blame for a downturn in this—or any other—industry? Rhetoric aside, *the rate of government control rarely accelerates during election years,* since the people most responsible for it generally realize that increased regulation is usually devastating—even if it does give them more power (at someone else's expense). Twenty years ago, the average American paid out approximately 14 percent of his income in taxes, but today he pays about 28 percent. "The public sector," as this economy in its own right is called, can make or break any company, trade or marketplace, but every four years it is managed with exceptional discretion. Like most folks in the aftermarket, we look forward to a very good year.

As the following regional breakdowns show, there are cheerful signs everywhere!

Region 1—New England (CT, ME, MA, NH, RI, VT). Last year at this time JOBBER TOPICS reported: "Once typified by deserted textile mills and shutdown shoe factories, this far northeast corner is now aglow with prosperity—and a remarkably low unemployment rate. Happily, automotive jobbers in this region are sharing in the good times."

This year, it would seem, the good times for New England's jobbers are getting even better. Fifty-two percent of the Region 1 respondents report that dollar sales are up (compared to 42.9 percent in 1987). Last year, no New Englander reported collections up, but 26.1 percent say so today. Unit sales, also, are up according to 40.9 percent (according to only 28.6 percent in 1987).

As for cash position, 50.0 percent of the Region 1 respondents note that it is better than it was a year ago (compared to 37.5 percent so reporting in 1987).

Region 2—Middle Atlantic (NJ, NY, PA). Business in Region 2 may not be easy—as several jobbers from the Mid Atlantic states commented—but it does seem to be moving along fairly well these days. There is competition to be sure. According to a jobber from Pennsylvania, "Add one more 'ma and pa' type parts store. Since 1975, 14 new parts stores have opened within a 15-mile radius."

A New Jersey jobber noted simply, "The new car warranty is killing us." Compared to last year, however, the statistical picture for Region 2 jobbers is downright rosy!

For example, the number of Middle Atlantic jobbers reporting that dollar sales were up (22.6 percent in 1987) has more than doubled in a mere twelve months (51.6 percent in 1988). Unit sales are up, as well, according to 39.3 percent (compared to 20.0 percent in 1987). Over 31 percent today (20.0 percent in 1987) state their cash position is better than it was a year ago.

Collection figures for Region 2 are still so-so at best—but, once again, better than last year's. In 1987, collections were down according to 22.6 percent of our Middle Atlantic respondents (14.3 percent in 1988) and up according to 12.9 percent (9.5 percent in 1988).

Region 3—East North Central (IL, IN, MI, OH, WI). Generally doing very well in 1988, jobbers from this region take second place in improved dollar sales and unit sales. Cash position and collection figures for Region 3 are also better than the national norms. Of course, to suggest that every jobber in the East North Central states has it made would be a gross oversimplification.

For example, a jobber from Ohio commented, "Warehouse suppliers are always changing brand names and part numbers. They give you books and no price sheets, or they give price sheets and no books—and if you get both, then no parts. Customers in the area don't have a lot of money to spend on parts, because they are laid off or totally unemployed. The ones who do have the money don't have an understanding of how to repair their cars. Things are getting too complicated for the average consumer."

Nonetheless, most reports from Region 3 were very positive indeed. "I believe that we are selling products instead of being an order taker," an Indiana jobber wrote. "Related sales have been excellent; our machine shop has absolutely been wound up for a year, as well. Seems like everything is going great."

According to another Hoosier, "Small industry was the leading gainer. Farmers are a little more encouraged and are spending more."

Region 4—West North Central (IA, KS, MN, MO, NE, ND, SD). Clearly, agriculture is the prime mover here; and evidently a healthy recovery continues to take place in The Farm Belt. Last year, *JT* noted: "Still, our report from these seven states was not altogether bleak. Take collections, for instance. Of reporting jobbers, 13.8 percent said they were up, an identical number reported them down, and a thumping 72.4 percent termed them unchanged. All figures were better than national norms."

"Bleak" is no word to describe Region 4 in 1988, however. Over 59 percent of the West North Central respondents report that dollar sales are up (compared to 22.6 percent in 1987) and unit sales are up according to 57.4 percent (compared to 20.0 percent in 1987). Likewise, cash position is ahead of the national norm, with 47.5 percent of Region 4 jobbers now stating that theirs is better than it was a year ago.

"The large sales increase," a Minnesota jobber commented, "is due largely to a greatly improved farm economy."

Region 5—South Atlantic (DE, DC, FL, GA, MD, NC, SC, VA, WV). A jobber from Virginia reports, "We are working harder to service the customer: stocking better, collecting better, selling better." Such efforts are apparently paying off for Region 5 jobbers in general. Since last year, for example, there has been a 66.2 percent gain in the number of South Atlantic jobbers who report that dollar sales are up, a 46.5 percent increase in the number reporting unit sales up, and a 65.9 percent rise in the number who state that their cash position has improved.

As for collections, Region 5 appears

Compare the first four months of 1988 to the first three of 1987, was your cash position better, worse, or about the same?

(Percent total respondents)

	Region 1	Region 2	Region 3	Region 4	Region 5	Region 6	Region 7	Region 8	Region 9	All Regions
Better	50.0	31.3	44.3	47.5	49.1	46.7	31.7	54.2	45.8	43.4
Worse	12.5	18.7	14.3	8.4	17.6	3.3	26.8	8.3	18.8	15.1
Same	37.5	50.0	41.4	44.1	33.3	50.0	41.5	37.5	35.4	41.5
	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Compare the first four months of 1988 to the first three of 1987

(Percent total respondents)

Unit Sales	Region 1	Region 2	Region 3	Region 4	Region 5	Region 6	Region 7	Region 8	Region 9	All Regions
Up	40.9	39.3	61.8	57.4	45.6	51.6	35.0	60.9	64.4	51.1
Down	18.2	32.8	14.7	13.0	28.1	9.7	20.0	8.7	17.8	19.5
Same	40.9	27.9	23.5	29.6	26.3	38.7	45.0	30.4	17.8	29.4
	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

New Trend Detected in Jobbers' '88 Sales Reports?

"Taken as a whole, the present data are the best in this decade, and comparisons to the 1987 numbers suggest a turnaround in the industry within the past 12 months."

to be doing a little better than it did last year, although not quite as well as the current national norms. In our 1988 survey, 16.1 percent of the South Atlantic respondents report collections are up (compared to 13.6 percent in 1987) and 14.3 percent note they are down (as opposed to 18.2 percent in 1987).

Region 6—East South Central (AL, KY, MS, TN,). Good unit sales and strong cash position distinguish Region 6. While 46.7 percent of the East South Central jobbers (slightly ahead of the All Regions average) state that their cash position is better than it was a year ago, only a scant 3.3 percent had to report it was worse—far lower than the national norm of 15.1 percent. Current dollar sales figures, however, fall a little below par, but they are remarkably better that the 1987 percentages for this region.

Last year, only 30.0 percent of the Region 6 jobbers reported dollar sales were up (compared to 53.1 percent in 1988) and 40.0 percent admitted they were down (only 12.5 percent in 1988). Collection figures have also improved: last year 30 percent of the East South Central jobbers noted that collections were down, but now the percentage is 9.4. In downside collections, this region shows the second-best performance of any in 1988—quite a turnaround, since it ranked second from the bottom twelve months ago.

Region 7—West South Central (AR, LA, OK, TX). Not altogether without hope, reports from Region 7 tend at best to be subdued. According to a jobber from Oklahoma, "Seasonal spring upturn did not occur this year. April is usually slow."

We were especially encouraged to hear from the enterprising Texan who wrote, "New business. Began operations in September 1987, thus the huge increase in sales. Unit sales are up proportionately. Collections are consistent because we have strict credit limitations. Only 21 percent of total gross sales are credit sales with most being 'weekly' collectibles. We sell only to installers, do no advertising other than outside salesmen, and less than one percent of gross sales comes from retail customers."

While the doldrums of the Oil Patch have become cliche, there is no getting around their persistence. As it did last year, Region 7 again ranks at the bottom in terms of unit sales, dollar sales, collections and cash position. Still, 1988 statistics show a good deal of improvement during the past twelve months; for example, the current figure for West South Central jobbers reporting dollar sales up (35.7 percent) is more than triple last year's.

Region 8—Mountain (AZ, CO, ID, MT, NV, NM, UT, WY). With the best cash position and good marks for dollar sales and unit sales, the Mountain jobbers as a group are evidently moving to higher ground for the second year in a row. In 1987, *JT* reported, "In dollar and unit sales, Region 8 was clearly the one that left others in a cloud of dust. Survey tabulations showed that 69.2 percent had dollar sales that were up. That left only 30.8 percent whose sales were down and no one whose sales were the same. In unit sales, the corresponding figures were 58.3 percent, 33.3 percent and 8.4 percent."

This year, 68.0 percent of the Region 8 jobbers report dollar sales are up and 60.9 percent that unit sales are up. As for cash position, 54.2 percent of the Mountain jobbers responding to our

1988 survey state it is better than it was last year, while only 8.3 percent state that it is worse. A jobber from Colorado commented, "Business has improved. Collections are still slow."

His statement pretty much summarizes the current Region 8 statistics, which show that 20.9 percent of the Mountain jobbers report collections are down, although 33.3 percent report that they are up. The upside figure for collections is enviable, but the downside percentage makes a big difference in the total picture.

Region 9—Pacific (AK, CA, HI, OR, WA) Well, the West Coast jobbers did it. Top spot for dollar sales and unit sales goes to Region 9. With 75.0 percent of the Pacific respondents reporting that dollar sales are up and 64.4 percent reporting unit sales are up, automotive business in this region looks good from most points of view. Still, the collections situation resembles that of its neighbor to the east, Region 8: although the high figure for the Pacific jobbers is only 27.7 percent, the spread between up and down is almost the same for both regions.

When considering 1987 performance, however, it may be said that Fortune appears to be smiling toward the setting sun. Last year we reported, "In dollar and unit sales, Region 9 vied with New England as runner-up to top-performing Region 8. Of the Region 9 jobbers, 42.9 percent said dollar sales were up, while 35.7 percent reported unit sales up. In both dollar and unit sales, the number reporting them unchanged was the same: 35.7 percent. Over 21 percent said dollar sales were down, while 28.6 percent reported unit sales down."

Cash position, for which Region 9 significantly outperformed the All Groups averages of our 1987 survey, has improved slightly in the past twelve months; and current national norms for cash position closely approximate this year's figures for the region. Coming out of a good year, the Pacific jobbers overall seem to be in the middle of a great one!

If sales were up, which class of trade contributed most to your increase?

	(Percent reporting sales up) All Regions
Garages and shops	42.8
DIYers	28.4
Service stations	10.4
Fleets	4.0
Industrial	2.0
Other	7.6
No answer	40.4

*Totals over 100 percent due to multiple mentions.

Compare the first four months of 1988 to the first three of 1987

Collections	(Percent total respondents) Region 1	Region 2	Region 3	Region 4	Region 5	Region 6	Region 7	Region 8	Region 9	All Regions
Up	26.1	9.5	19.7	13.3	16.1	15.6	11.9	33.3	27.7	17.7
Down	4.3	14.3	5.6	13.3	14.3	9.4	23.8	20.9	14.8	13.2
Same	69.6	76.2	74.7	73.4	69.6	75.0	64.3	45.8	57.5	69.1
	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

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Automotive Wholesalers Among Largest in 1987

Based on Number of Branch Stores and Outside Salesmen

	BR.	Outside Sales	Shops
1. Ace Auto Parts Co., Inc., Petersburg, FL	26	10	1
2. Acme Auto Supply, Inc., Hartford, CT	25	13	1
3. Anderson Auto Parts Co., Inc., Anderson, SC	38	21	26
4. Arnold Motor Supply, Spencer, IA	19	19	46
5. Auto Parts Depot, Inc., Van Nuys, CA	21	5	6
6. Automotive One Parts Stores, Inc., Orlando, FL	24	4	2
7. The Automotive Parts Co., Inc., Worthington, OH	20	24	4
8. Automotive Supply Co., Inc., Appleton, WI	14	10	6
9. B & C Auto Supply, Div. Republic Autom. Parts, Inc., Anchorage, AK	16	6	—
10. Barnes Motor & Parts Co., Inc., Wilson, NC	24	30	7
11. Big "A" Auto Parts, Inc., Lebanon, PA	16	20	2
12. Burdman Auto Parts, Inc., Kirksville, MO	30	28	1
13. Burton Auto Supply, Inc., Weslaco, TX	13	11	2
14. Byrd Auto Parts Co., Inc., Burlington, NC	15	2	3
15. Carquest, The Parts Place, Sanford, ME	28	8	3
16. Chanen's Auto Supply Co., Quincy, IL	14	10	1
17. Christie & Thomson, Inc., Worcester, MA	14	6	2
18. Conrasa, Calexico, CA	50	—	1
19. Crow-Burlingame Co., Little Rock, AR	60	59	4
20. Darling's Auto Parts, Bangor, ME	14	10	1
21. H.E. Everson Co., Grand Forks, ND	19	15	1
22. Finishmaster Automotive Paint Stores, Kentwood, MI	14	24	—
23. Genuine Parts Co., Tampa, FL	13	13	5
24. Genuine Parts Co., Norcross, GA	30	10	5
25. Green Light Auto, Ft. Smith, AR	55	42	12
26. Guarantee Auto Stores, Inc., Indianapolis, IN	77	—	—
27. Hedahls, Inc., Bismarck, ND	14	20	11
28. Holyoke Auto Parts & Equip., Inc., dba Hapco Auto Parts, Holyoke, MA	18	9	—
29. Inter-State Auto Supply Co., Elizabethtown, KY	17	22	9
30. Jasper Engine & Transmission Exchange, Jasper, IN	15	35	—
31. Keenan Auto Parts Co., Heavy Duty Div., Albany, GA	30	18	16
32. Kirkham Auto Parts Service Co., Blackfoot, ID	25	7	4
33. Linkon's Auto Supply, Centralia, IL	30	23	4
34. Milford Auto Parts, Inc., Woonsocket, RI	14	8	3
35. Miller Auto Replacement Parts, Inc., Watertown, WI	15	9	4
36. Molin Auto Parts, Buffalo, NY	22	10	3
37. Motor Bearings & Parts Co., Raleigh, NC	22	25	6
38. National Auto Supply Co., Brentwood, MO	17	20	11
39. Northern Auto Supply Co., Div. of Northern Ind., Marshfield, WI	29	20	11
40. O.K. Auto Supply Co., Inc., Ishpeming, MI	17	12	5
41. O'Reilly Automotive, Inc., Springfield, MO	77	12	8
42. Parker Auto Supply, Sumter, SC	18	3	1
43. RPS Products, Inc., Baltimore, MD	23	17	3
44. Republic Automotive Parts, Inc., Brentwood, TN	80	30	10
45. Rodefeld Co., Inc., Richmond, IN	16	16	13
46. Rupp Automotive, Columbia, MO	18	6	10
47. Sanel Auto Parts, Inc., Concord, NH	27	27	3
48. Short's Auto Parts, Inc., Hazel Park, MI	14	—	1
49. Sieg Co., Davenport, IA	16	11	1
50. Southern Auto Supply, Inc., Bakersfield, CA	13	5	2
51. Sam Stinger Auto Parts, Springfield, MO	23	—	—
52. Sturdevant's Inc., Wahpeton, ND	13	10	5
53. Taylor Parts & Supply Co., Inc., Andalusia, AL	28	4	8
54. Twin 'B' Delmarva, Chesapeake, VA	27	—	—
55. Wharton & Barnard, Inc., Milford, DE	14	13	3
56. Womwell Automotive Parts Co., Inc., Lexington, KY	28	12	3

Source: JOBBER TOPICS, Directory of Automotive Jobbers July 1987.

Profile of the Franchised Dealer's Service and Parts Operation

	Average Dealership	All Dealers
Total Service and Parts Sales	$1,502,174	$ 37.7 Billion
Total Gross Profit as percent of Service and Parts Sales	38.5%	XX
Total Net Profit as percent of Service and Parts Sales	1.9%	XX
Total Number of Repair Orders Written	7,625	191 Million
Total Service and Parts Sales per Customer Repair Order	$ 145	XX
Total Service and Parts Sales per Warranty Repair Order	$ 105	XX
Number of Mechanics	9	221,860
Number of Service Bays (excluding body)	14	355,000
Total Parts Inventory	$ 172,000	$ 4.3 Billion
Average Customer Mechanical Labor Rate	$ 34	XX

Source: National Automobile Dealers Assn, Industry Analysis Division.

Franchised New Car Dealer Service and Parts

(Millions of Dollars)

SERVICE LABOR SALES	1986	1987	Percent Change
Customer Mechanical	5,603	6,370	13.7
Customer Body	2,353	2,551	8.4
Warranty	2,368	2,519	6.4
Sublet	1,250	1,284	2.7
Internal	2,000	2,166	8.3
Other	1,132	1,155	2.0
Total Service Labor	14,706	16,046	9.1
PARTS SALES			
Customer Mechanical	4,138	4,886	18.1
Customer Body	2,340	2,551	9.0
Wholesale	6,218	6,218	0.0
Counter	1,315	1,427	8.5
Warranty	2,978	3,243	8.9
Internal	1,992	2,140	7.5
Other	696	735	5.6
Total Parts	19,336	21,621	11.8
TOTAL SERVICE & PARTS	$34,042	$37,667	10.6

Source: National Automobile Dealers Assn, Industry Analysis Division.

State-by-State Look

State	Car Registration[1]	Truck and Bus Registration[1]	Total Registration[1]	Automotive Distributors/ Outlets[2]
Ala.	2,534,000	936,000	3,470,000	591
Alaska	233,000	138,000	371,000	49
Ariz.	1,698,000	742,000	2,440,000	355
Ark.	952,000	507,000	1,459,000	438
Calif.	15,978,000	4,630,000	20,608,000	1,429
Colo.	2,016,000	753,000	2,769,000	414
Conn.	2,496,000	162,000	2,658,000	395
Del.	386,000	106,000	492,000	65
D. of C.	278,000	17,000	295,000	23
Fla.	8,752,000	2,191,000	10,943,000	1,369
Ga.	3,659,000	1,447,000	5,106,000	780
Hawaii	640,000	95,000	735,000	100
Idaho	536,000	322,000	858,000	188
Ill.	6,084,000	1,325,000	7,409,000	1,361
Ind.	3,241,000	1,084,000	4,325,000	789
Iowa	1,890,000	733,000	2,623,000	603
Kan.	1,518,000	685,000	2,203,000	466
Ky.	1,838,000	907,000	2,745,000	543
La.	1,868,000	963,000	2,831,000	514
Maine	694,000	222,000	916,000	202
Md.	2,830,000	621,000	3,451,000	389
Mass.	3,430,000	497,000	3,927,000	688
Mich.	5,493,000	1,446,000	6,939,000	1,255
Minn.	2,400,000	707,000	3,107,000	490
Miss.	1,374,000	424,000	1,798,000	361
Mo.	2,741,000	1,049,000	3,790,000	816
Mont.	468,000	225,000	693,000	158
Neb.	871,000	435,000	1,306,000	295
Nev.	581,000	231,000	812,000	86
N.H.	972,000	192,000	1,164,000	155
N.J.	4,870,000	503,000	5,373,000	854
N.M.	894,000	513,000	1,407,000	188
N.Y.	8,754,000	1,242,000	9,996,000	1,692
N.C.	3,585,000	1,349,000	4,934,000	940
N.D.	379,000	262,000	641,000	119
Ohio	6,730,000	1,474,000	8,204,000	1,347
Okla.	1,893,000	1,041,000	2,934,000	447
Ore.	1,709,000	627,000	2,336,000	333
Pa.	6,267,000	1,457,000	7,724,000	1,456
R.I.	544,000	108,000	652,000	120
S.C.	1,782,000	587,000	2,369,000	426
S.D.	412,000	266,000	678,000	123
Tenn.	3,298,000	858,000	4,156,000	644
Texas	8,495,000	3,926,000	12,421,000	2,011
Utah	760,000	365,000	1,125,000	175
Vt.	326,000	113,000	439,000	98
Va.	3,711,000	1,007,000	4,718,000	636
Wash.	2,716,000	1,190,000	3,906,000	550
W. Va.	826,000	369,000	1,195,000	221
Wis.	2,402,000	719,000	3,121,000	573
Wyo.	237,000	180,000	417,000	87
TOTAL	139,041,000	41,948,000	180,989,000	28,407

at the Wholesaler's Market

Vehicles Per Wholesaling Outlet[3]	Car Dealers[4]	Truck & Trailer Dealers[4]	Service Stations & Truck Stops[5]	Auto Repair Shops[6]	State
5,870	327	259	976	1,691	Ala.
7,531	36	23	122	164	Alaska
6,748	224	124	559	1,507	Ariz.
3,308	301	199	863	1,083	Ark.
14,257	1,618	832	4,510	14,991	Calif.
6,674	285	159	738	1,944	Colo.
6,724	344	179	1,056	1,577	Conn.
7,493	65	43	166	299	Del.
12,840	8	5	125	403	D. of C.
7,926	806	433	2,159	5,757	Fla.
6,401	538	357	1,430	2,825	Ga.
7,272	60	49	287	567	Hawaii
4,565	124	82	344	484	Idaho
5,469	1,112	551	2,785	5,030	Ill.
5,449	571	387	1,525	2,577	Ind.
4,367	515	305	1,523	1,526	Iowa
4,716	341	191	1,070	1,312	Kan.
4,999	324	263	1,264	1,355	Ky.
5,485	325	236	961	2,035	La.
4,560	161	1[illegible]	400	537	Maine
8,785	297	179	1,099	1,798	Md.
5,699	541	255	1,716	3,104	Mass.
5,501	809	451	2,141	3,887	Mich.
6,316	531	316	1,666	1,706	Minn.
4,969	278	184	543	984	Miss.
4,580	552	339	1,716	2,659	Mo.
4,477	159	111	412	483	Mont.
4,403	252	164	920	944	Neb.
9,236	70	45	206	492	Nev.
7,416	140	89	321	498	N.H.
6,286	690	332	2,612	4,052	N.J.
7,369	114	85	421	721	N.M.
5,880	1,318	589	3,916	8,214	N.Y.
5,173	624	382	1,620	2,746	N.C.
5,432	148	95	426	292	N.D.
6,065	1,026	605	2,748	5,039	Ohio
6,528	383	231	1,008	1,483	Okla.
7,040	290	186	705	1,375	Ore.
5,257	1,285	651	3,450	5,996	Pa.
5,368	82	59	272	544	R.I.
5,514	296	165	856	1,357	S.C.
5,425	144	75	489	357	S.D.
6,417	420	375	1,233	2,099	Tenn.
6,167	1,362	772	3,113	8,481	Texas
6,406	144	99	449	744	Utah
4,393	91	64	200	261	Vt.
7,284	544	322	1,473	2,496	Va.
7,013	331	202	1,055	2,148	Wash.
5,364	216	132	630	630	W. Va.
5,453	646	394	1,761	1,925	Wis.
4,902	88	62	270	302	Wyo.
6,329	21,956	12,788	62,323	115,481	TOTAL

Sources: [1]U.S. Federal Highway Administration. [2]JOBBER TOPICS Circulation File (1988). [3]Vehicles per wholesaling outlet obtained by dividing outlets into total registration. Final figure is average for all states. [4]R. L. Polk & Co. Marketing Services Division (1988). [5]SUPER Automotive SERVICE Circulation File (1988). Figures represent service stations and truck stops qualified for automotive repair and service work. [6]U.S. Census of Business (1982).

ASIA Wholesaler's Costs, Income And Profit as Percentage of Sales

	Median Wholesaler (1986)
SALES	100.00%
Cost of Goods Sold	66.43%
GROSS MARGIN OF PROFIT (Sales minus cost of goods sold)	33.58%
SELLING EXPENSE (Includes: Advertising & sales promotion; salesmen's salaries, commission, travel, etc.; sales supervisory salaries & commissions; countermen's salaries & commissions.)	8.87%
DELIVERY EXPENSE (Includes: Delivery salaries (including bonuses); vehicle operating expenses; depreciation—vehicle equipment; transportation out and parcel post.)	2.60%
STORE AND OCCUPANCY EXPENSE (Includes: Stockroom wages; heat, light & water; rent (or depreciation.))	4.81%
GENERAL AND ADMINISTRATIVE EXPENSE (Includes: Executive salaries & bonuses; supervisory salaries & bonuses; clerical salaries, wages & bonuses; purchase & inventory control salaries & wages; travel & trade relations; office supplies & postage; misc. G & A expense (dues & donations); EDP equipment or purchase service cost; telephone & telegraph; legal & professional fees; general taxes; general insurance; employee benefits.)	13.20%
TOTAL OPERATING EXPENSES	32.67%
NET OPERATING INCOME	1.16%
TOTAL OTHER INCOME	1.33%
TOTAL INCOME	2.79%
TOTAL OTHER EXPENSES	1.19%
NET PROFIT BEFORE MACHINE SHOP	1.22%
NET PROFIT FROM SHOP OPERATIONS	.45%
NET PROFIT BEFORE TAXES	1.64%
NET PROFIT AFTER TAXES	1.05%

Source: 1987 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis,* published by the Automotive Service Industry Assn.

The Meaning of Median Figures

Readers will notice that a number of tables in this special section make use of median figures instead of, say, average figures. Many modern business analysts believe that medians are more precise than averages—hence a growing trend toward the use of medians.

The word "median," according to the dictionary, refers to the middle. In a statistical sampling, the word median refers to that firm whose figures place it in the exact middle of the sampling. In a study of the business costs of a thousand automotive wholesalers, for example, the median wholesaler would be that firm in the middle; five hundred of the firms would have higher costs and five hundred would have lower costs—in graduated figures working away from that median or middle firm.

Quick Profile of the Median ASIA Wholesaler

Figures Apply to 1986

SALES PERFORMANCE	
Average Sales Volume	$1,785,480
Percent Increase Over Previous Year	.01%
Cash Sales as Percent of Total Sales	21.85%
PROFITABILITY PERFORMANCE	
Gross Profit Margin as Percent of Net Sales	33.58%
Net Profit Before Taxes as Percent of Net Sales	1.64%
Net Profit After Taxes as Percent of Net Sales	1.05%
ASSET MANAGEMENT	
Average Inventory Turnover Rate	3.05 (times)
Number of Days Average Inventory Carried	120 (Days)
Days Credit Sales in Accounts Receivable	39 (Days)
FINANCIAL MANAGEMENT[1]	
Net Worth to Total Indebtedness	1.36 to 1
Current Ratio	3.34 to 1
Accounts Receivable to Accounts Payable	1.10 to 1
OPERATING EXPENSES	
Total Operating Expenses to Net Sales	32.67%
Total Payroll Expense as Percent of Net Sales	18.03%
PERSONNEL MEASUREMENTS	
Sales Volume Per All Non-Shop Employees	$99,620
Average Payroll Per All Non-Shop Employees	$17,360
MACHINE SHOP PERFORMANCE	
Shop Sales Per Shop Employee	$29,770
Average Wage or Salary Per Shop Employee	$20,020
Gross Profit Margin as Percent of Shop Labor Sales	38.68%
Shop Net Profits to Shop Labor Sales	11.34%

Source: 1987 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis,* published by the Automotive Service Industry Assn. [1]These ratios relate dollars to dollars. In the ratio of accounts receivable to accounts payable, for instance, the median wholesaler had $1.10 of accounts receivable for every $1.00 of accounts payable.

ASIA's Median Wholesaler: How Well He Managed His Assets

	Median Wholesaler (1986)
Percent of Companies On LIFO	43.3 %
Change in Inventory During Year	3.20%
Average Inventory Turnover Rate	3.1 (Times)
Number of Days Average Inventory Carried	120 (Days)
Cash Sales as a Percent of Total Sales	21.85%
Days of Credit Sales in Accounts Receivable	39 (Days)
Ratio of Sales to Net Working Capital	4.2 to 1
Ratio of Sales to Assets (Total Asset Turnover)	2.4 to 1[1]

Source: 1987 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis,* published by Automotive Service Industry Assn. [1]This ratio relates dollars to dollars. There were $2.40 of sales, for instance, to every $1.00 of assets.

Balance Sheet of Median ASIA Wholesaler—1986

	Median Wholesaler (1986)
ASSETS	
Cash and Marketable Securities	7.37%
Accounts & Notes Receivable, Trade, Net	20.84%
Inventory (End of Period)	53.86%
All Other Current Assets	2.07%
Total Current Assets	84.13%
Net Fixed & All Other Non-Current Assets	15.87%
Total Assets	100.00%
LIABILITIES AND NET WORTH	
Accounts & Notes Payable, Trade	20.37%
Other Notes Payable & Other Current Liabilities	8.18%
Total Current Liabilities	28.52%
Long Term Liabilities	17.29%
Total Liabilities	45.81%
Total Net Worth or Equity	54.19%
Total Liabilities & Net Worth	100.00%

Source: 1987 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis,* published by the Automotive Service Industry Assn.

Leading Product Items As Reported by ASIA Jobbers

The following merchandise items proved to be "best sellers" for ASIA wholesalers during 1985. Each item contributed more than one percent to the average wholesaler's total sales volume.

1. Filters & Cartridges (all)
2. Paint, Thinner, Solvents
3. Belts & Hoses (all)
4. Starter Batteries
5. Exhaust System Parts (all)
6. Shocks, Levelers, Struts
7. Brake Shoes, Pads & Linings
8. Ignition Parts, Mechanical & Electronic
9. Spark Plugs
10. Water Pumps & Parts
11. Air Conditioners & Parts
12. Brake Cylinders (Master & Wheel)
13. Wire & Cable (all)
14. Alternators, Generators & Parts
15. Carburetors, Parts & Kits
16. Ball Joints, Control Arms
17. Gaskets
18. Motor Oil
19. Abrasives, Adhesives
20. Bearings (except engine)
21. Brake Drums, Rotors
22. Clutches, Parts
23. Hand Tools/Manuals
24. Engine Bearings
25. Sealed Beam Lights
26. Seals (all)
27. Wiper Blades, Arms
28. Safety Glasses
29. Starter Motors, Drive
30. Anti-Freeze
31. U-Joints & Kits
32. Tie Rod Ends & Idler Arms
33. Hand Tools/Power
34. Fuel Pumps, Kits & Parts
35. Timing Gears, Chains, Sprockets

Source: 1986 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis,* published by the Automotive Service Industry Association.

Number of Workers, by Category Of Median ASIA Wholesaler

Job Classification	Average Number Employed
Outside Salesmen	2.75
Countermen	6.00
Deliverymen	2.75
Stockroom Employees	2.00
Executives	1.00
General & Administrative Clerical Employees	2.50
Non-Shop Employees	18.00
All Store Employees	3.00

Source: 1987 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis,* published by the Automotive Service Industry Assn.

ASIA's Median Wholesaler: How His Profits Scored in 1986

	Median Wholesaler (1986)
Gross Profit Margin as Percent of Net Sales	33.58%
Net Profit (Before Taxes) as Percent of Net Sales	1.64%
Net Profit (After Taxes) as Percent of Net Sales	1.05%
Net Profit (Before Taxes) as Percent of Total Assets	3.70%
Net Profit (After Taxes) as Percent of Total Assets	3.00%
Net Profit (Before Taxes) as Percent of Net Worth	7.12%
Net Profit (After Taxes) as Percent of Net Worth	5.20%
Net Profit (Before Taxes) as Percent of Net Working Capital	7.02%
Net Profit (After Taxes) as Percent of Net Working Capital	5.63%
Shop Gross Profit as Percent of Shop Labor Sales	38.68%
Shop Net Profit as Percent of Shop Labor Sales	11.34%

Source: 1987 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis,* published by the Automotive Service Industry Assn.

Productivity Measures For Staff of ASIA Jobber

Average Number of Non-Shop Employees	18.0
Merchandise Sales Per Non-Shop Employee	$99,620
Merchandise Gross Margin Per Non-Shop Employee	$33,570
Taxes & Benefits Per Non-Shop Employee	$ 2,490
Total Payroll Expense as Percent of Merchandise Sales	18.30%
Total Payroll Expense as Percent of Merchandise Gross Margin	54.02%
Total Compensation as Percent of Merchandise Sales	20.36%

Source: 1987 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis,* published by the Automotive Service Industry Assn.

Expense Item Statement For Median ASIA Jobber

	Percent of Net Sales (1986)
Advertising and Sales Promotion	.59%
Salesmen's Salaries, Travel, etc.	2.68%
Inside Countermen's Salaries & Commissions	4.61%
Total Selling Expenses	8.87%
Delivery Salaries (including bonuses)	1.09%
Vehicle Operating Expense	.55%
Total Delivery Expenses	2.60%
Stockroom Wages	.82%
Heat, Lights and Water	[illegible]
Rent (or depreciation)	1.80%
Repairs & Maintenance (building)	.27%
Depreciation (store fixtures and equipment)	.44%
Total Store & Occupancy Expenses	4.81%
Executive Salaries and Bonuses	2.57%
Supervisory Salaries and Bonuses	1.85%
Clerical Salaries and Wages	1.51%
EDP Equipment and/or Purchase Service Cost	.81%
Telephone and Telegraph	.76%
Taxes, General	.52%
Taxes, Payroll	1.57%
Insurance, General	.91%
Employee Benefits	1.10%
Total General & Administrative Expenses	13.20%
TOTAL OPERATING EXPENSE	32.67%

Source: 1987 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis*, published by the Automotive Service Industry Assn.

Automotive Wholesaler Failures

Year	Number	Liabilities	Year	Number	Liabilities
1946	1	$ 47,000	1967	91	$9,211,000
1947	17	456,000	1968	72	8,411,000
1948	26	892,000	1969	49	7,383,000
1949	44	1,150,000	1970	61	4,617,000
1950	55	1,083,000	1971	59	8,478,000
1951	23	330,000	1972	46	4,452,000
1952	22	529,000	1973	55	10,295,000
1953	28	1,010,000	1974	60	7,024,000
1954	39	1,015,000	1975	65	12,122,000
1955	53	1,523,000	1976	57	30,272,000
1956	41	2,699,000	1977	48	27,849,000
1957	45	1,470,000	1978	43	6,270,000
1958	42	1,275,000	1979	48	51,445,000
1959	50	1,744,000	1980	109	47,730,000
1960	77	4,191,000	1981	112	29,682,000
1961	89	3,744,000	1982	138	74,386,000
1962	80	4,696,000	1983	183	59,151,000
1963	74	3,917,000	1984	241	33,319,000
1964	94	3,452,000	1985	272	64,710,000
1965	84	4,488,000	1986	303	119,104,460
1966	98	5,632,000	1987	238	37,702,837[1]

Source: Economic Analysis Dept., Dun & Bradstreet Corp. [1]Preliminary figures.

ASIA Jobber's Operating Costs As Percent of Gross Margin

	Median Wholesaler (1986)
Total Selling Expenses as Percent of Net Sales	8.87%
Total Selling Expenses as Percent of Gross Margin	27.61%
Total Delivery Expenses as Percent of Net Sales	2.60%
Total Delivery Expenses as Percent of Gross Margin	8.45%
Total Store & Occupancy Expenses as Percent of Net Sales	4.81%
Total Store & Occupancy Expenses as Percent of Gross Margin	15.64%
Total General & Administrative Expenses as Percent of Net Sales	13.20%
Total General & Administrative Expenses as Percent of Gross Margin	39.36%

Source: 1987 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis*, published by the Automotive Service Industry Assn.

Key Business Ratios For ASIA's Median Wholesaler[1]

	Median Wholesaler (1986)
Ratio of Net Worth to Total Indebtedness	1.36 to 1
Ratio of Total Assets to Net Worth	1.65 to 1
Ratio of Sales to Net Worth (Turnover of Net Worth)	4.24 to 1
Ratio of Current Assets to Current Debts	3.34 to 1
Ratio of Accounts Receivable to Accounts Payable	1.10 to 1

Source: 1987 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis*, published by the Automotive Service Industry Assn. [1]All these ratios relate dollars to dollars. In the ratio of sales to net worth, for instance, the median wholesaler had $4.24 of sales for every $1.00 of net worth.

ASIA Wholesaler's Shop Profit As Percent of Labor Sales—1986

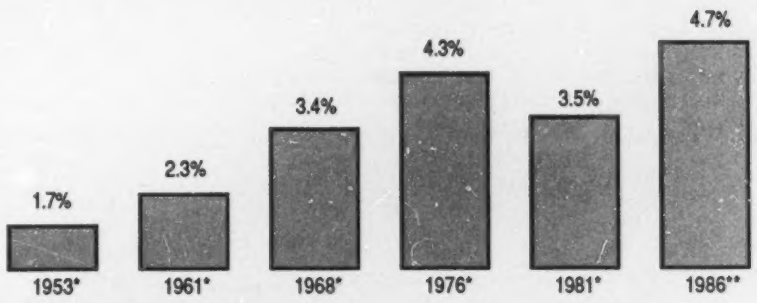
	Median Wholesaler (1986)
SALES—SHOP LABOR	100.00%
Cost of Shop Labor Sales (Salaries, Wages & Bonuses)	61.32%
GROSS PROFIT ON SHOP LABOR SALES	38.68%
All Other Shop Expenses (Overhead, Depreciation, Repairs & Maintenance, Supplies, etc.)	24.04%
NET PROFIT FROM SHOP OPERATIONS	11.34%

Source: 1987 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis*, published by the Automotive Service Industry Assn.

DELIVERY COST AS A PERCENT OF SALES

Cost per delivery, including all vehicle registrations, maintenance, depreciation, drivers' salaries and fuel costs. All-group figures.

(Average percent)

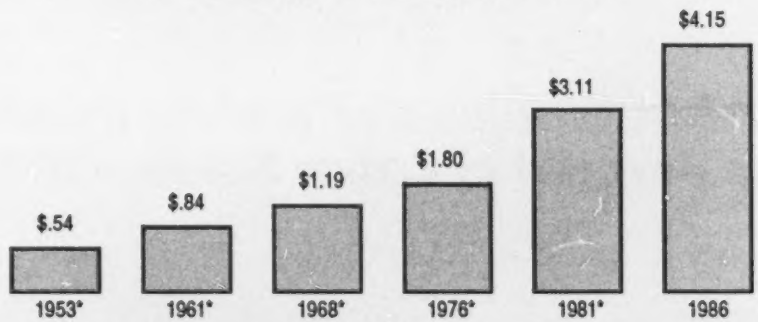


Source: Forum Survey Report on Delivery Service: Why the Constant Rise?, published in October 1987 JOBBER TOPICS.
*Figures from earlier JOBBER TOPICS Forum Studies. Figures for 1956 and 1963 were 2.0 percent and 2.7 percent respectively.
** Percent of net sales.

COST PER DELIVERY: ITS ESCALATION SINCE 1953

Cost per delivery, including all vehicle registrations, maintenance, depreciation, drivers' salaries and fuel costs. All-group figures.

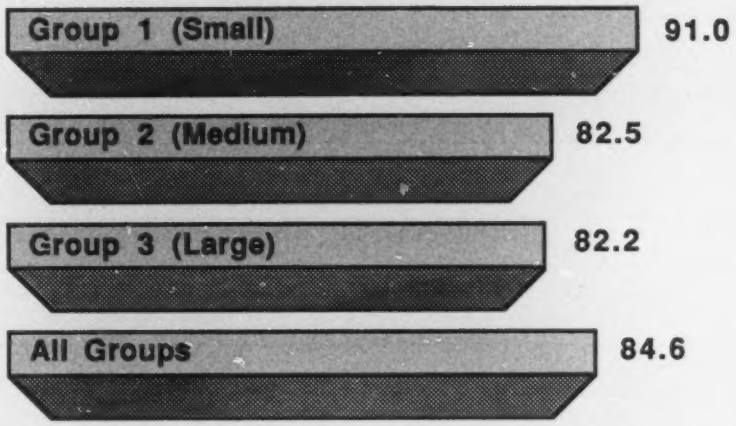
(Average cost in dollars and cents.)



Source: Forum Survey Report on Delivery Service: Why the Constant Rise?, published in October 1987 JOBBER TOPICS.
*Figures from earlier JOBBER TOPICS Forum studies. In 1956 Forum panelists reported an average delivery cost of 76 cents; the 1963 figure was 86 cents.

PERCENT OF JOBBER SALES HANDLED BY COUNTERMEN

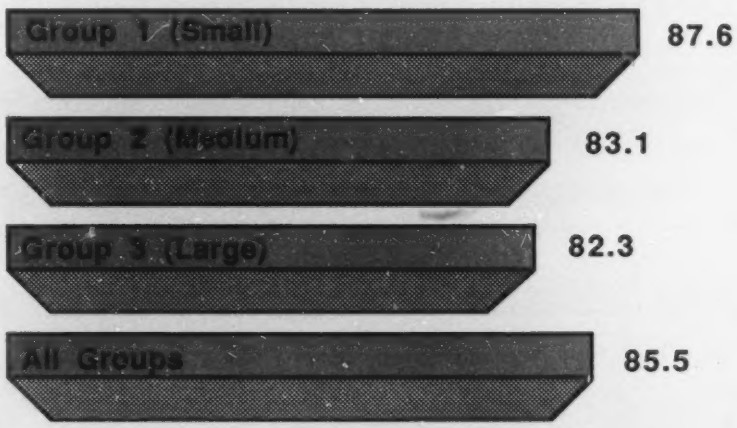
(Average percents)



Source: Forum Survey Report on Counter Personnel, published February 1988 JOBBER TOPICS. In Forum Studies, Small Jobbers have annual sales of $350,000; Medium Jobbers have sales of $350,000 to $750,000; and Large Jobbers have over $750,000.

JOBBERS CONSULTING COUNTERMEN ON LINE CHANGES AND/OR ADDITIONS

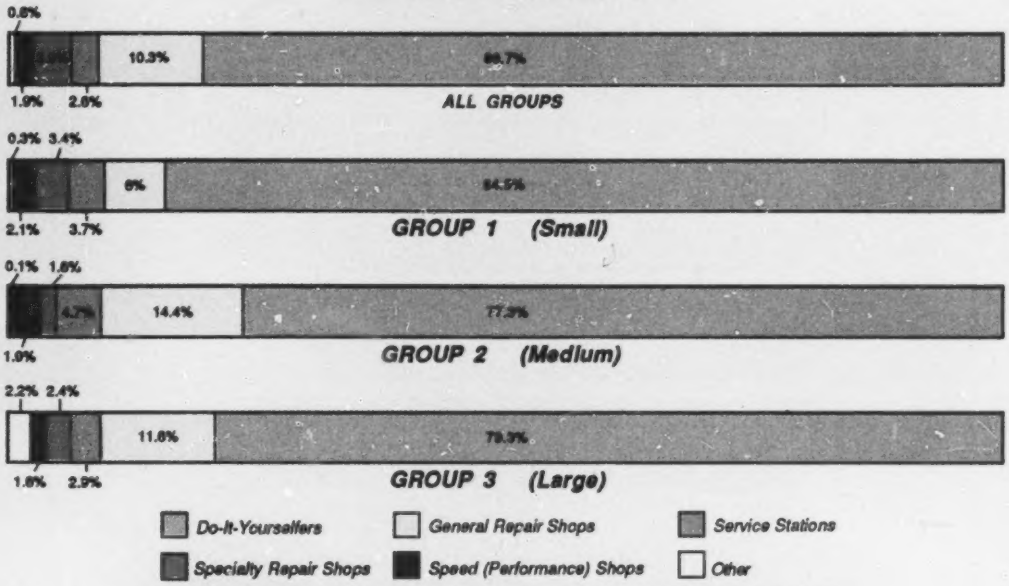
(Percent of jobber respondents)



Source: Forum Survey Report on Counter Personnel, published February 1988 JOBBER TOPICS. In Forum Studies, Small Jobbers have annual sales of $350,000; Medium Jobbers have sales of $350,000 to $750,000; and Large Jobbers have over $750,000.

WHERE SALES ARE MADE

What percentage of your high performance sales are made to each type of customer?

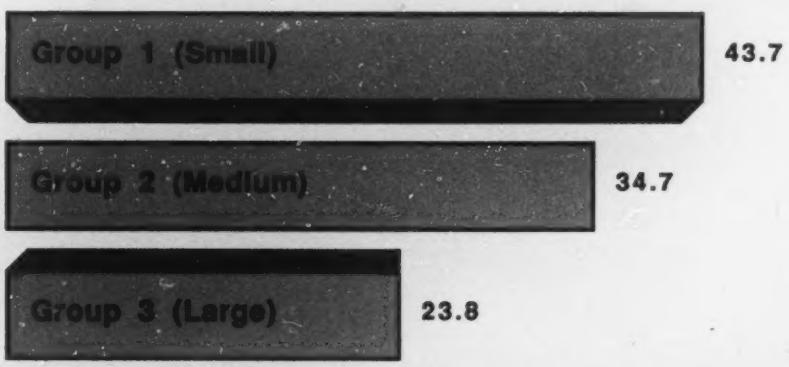


Source: Forum Survey Report on High Performance, published April 1988 JOBBER TOPICS. In Forum Studies, Small Jobbers have annual sales of $350,000; Medium Jobbers have sales of $350,000 to $750,000; and Large Jobbers have over $750,000.

WALK-IN BUSINESS AS A PERCENT OF SALES

What percentage of your total annual sales are made to walk-in (DIY) trade?

(Average percents)

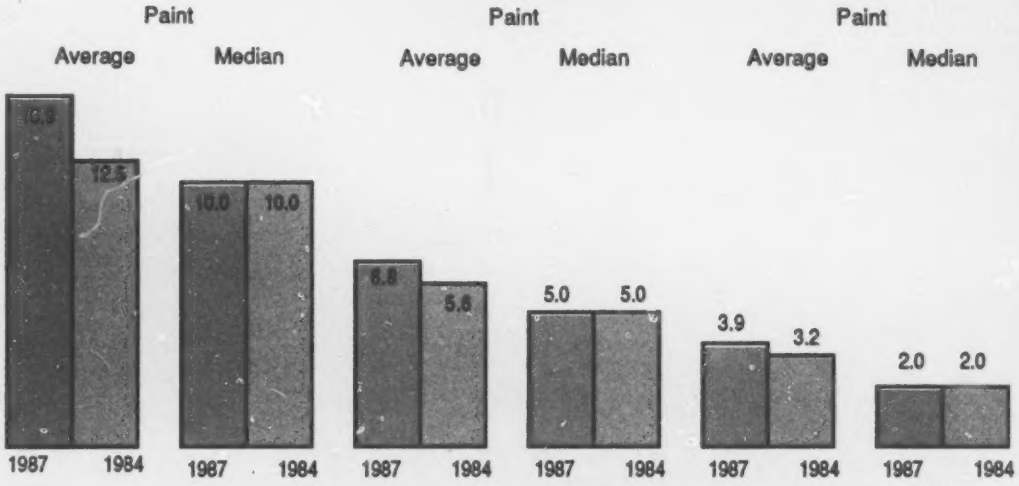


Source: Forum Survey Report on the Do-it-yourself Market, published December 1987 JOBBER TOPICS. In Forum Studies, Small Jobbers have annual sales volume under $350,000; Medium Jobbers have sales of $350,000 to $750,000; and Large Jobbers have sales over $750,000.

SHARE OF TOTAL VOLUME

What percent of your total dollar volume comes from sales of paint, body shop supplies and body shop equipment?

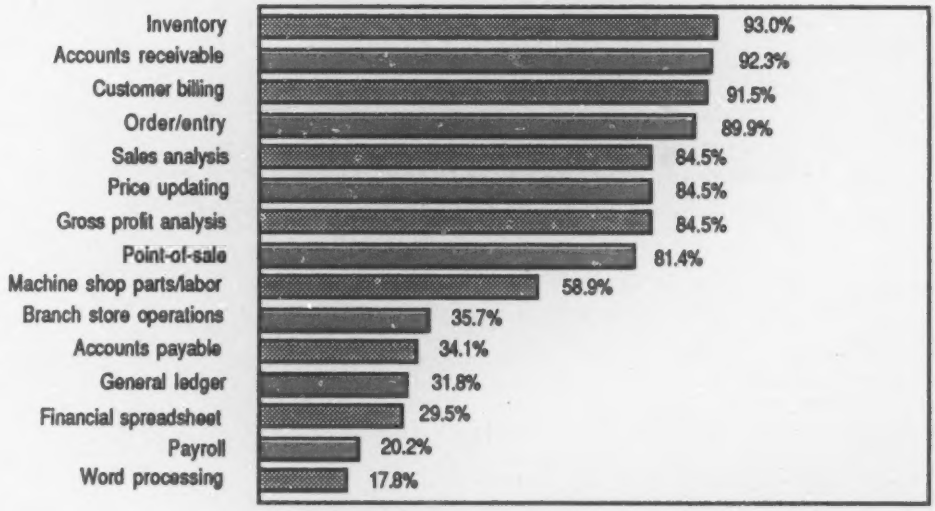
All Groups



Source: Forum Survey Report on PB&E Sales, published August 1987 JOBBER TOPICS. Percent of total sales (for respondents who sell specified categories).

MOST POPULAR COMPUTER OPERATIONS

Which operations do you perform by computer?



Source: Forum Survey Report on Computer Systems and Inventory Control, published June 1988 JOBBER TOPICS. Percent respondents having computers.

Leading Product Groupings As Reported by ASIA Jobbers

The following product "families" or lines proved to be the "best sellers" for ASIA wholesalers during 1985. Lines are ranked according to the dollar volume of sales generated.

1. Paint, Body & Equipment (all)
2. Ignition System Parts (all)
3. Starting, Generating, Electrical (all)
4. Brake System Parts (all)
5. Chassis, Steering, Suspension (all)
6. Filters & Cartridges
7. Belts & Hoses (all)
8. Exhaust System Parts (all)
9. Cooling & Heating System Parts
10. Engine Parts (Internal)
11. Chemicals
12. Fuel System Parts
13. Drive Train Components
14. Hand Tools
15. Gaskets (all)
16. Motor Oil
17. Bearings (except engine)
18. Lighting System
19. Seals (all)

Source: 1986 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis*, published by the Automotive Service Industry Association.

Certified Mechanics By Type of Employer

	Number of Certified Technicians	Percent of Total Certified
Domestic Dealerships	73,894	34.07
Import Dealerships	23,807	10.98
Service Stations	21,537	9.93
Independent Garages	25,522	11.77
Specialty Shops	7,693	3.55
Tire Dealers	19,173	8.84
Volume Retailers	3,331	1.54
Fleets (private)	8,624	3.98
Other	33,264	15.34
TOTAL	216,845	100.%

Source: The National Institute for Automotive Service Excellence. Figures represent technicians currently certified through fall of 1987 testing.

ASE Testing and Certifying of Mechanics (1972-1987)

Total Registered, excluding repeaters	547,244
Total Actually Taking Tests, excluding repeaters	487,453
Total Passing Tests, including expired certifications	396,478
Total Currently Certified, excluding expired certifications (Net)	216,845
—Total Currently Certified in either all automotive or all truck areas	48,656
—Total Currently Certified in all auto and all truck	2,180
(Total also Currently Certified in Body Repair and Painting and Refinishing—all 16 areas)	488
Number of Regular Tests Taken	2,514,983
Number of Regular Tests Passed	1,633,118
Number of Recertification Tests Passed	381,279

Source: The National Institute for Automotive Service Excellence.

PBE Wholesalers' Cost of Doing Business, as Reported by ASIA

Median Figures—Based on 1987 Operations and Expressed as Percentage of Total Sales

NET SALES (After Returns & Allowances)	100.0%
Cost of Sales—Merchandise	66.3%
Gross Margin of Profit—Merchandise	33.7%
Total Operating Expenses (All Salaries, Sales Expenses, Delivery, G & A, etc.)	31.6%
Net Operating Income	1.6%
Total Other Income (Interest Earned, Gain from Sales of Assets, etc.)	1.0%
Total Other Expenses (Include Cash Discounts Allowed, Interest Expense, Bank Charges, Loss on Sale of Assets, etc.)	.6%
Net Profit Before Taxes	2.3%
Federal, State and Local Income Tax	.4%
Net Profit After Taxes	1.8%
DETAILED EXPENSE ITEMS	
Executive Salaries & Bonuses	4.1%
Salaries, Commissions & Bonuses (Salesmen & other employees)	12.9%
Advertising and Sales Promotion	.5%
Vehicle Expenses (Include delivery expenses, salesmen's cars, other company operated vehicles)	1.2%
Transportation Out & Parcel Post	.2%
Donations, Dues, Subscriptions, etc.	.1%
Professional Fees (Including Legal, Accounting, etc.)	.3%
Bad Debts Less Recoveries	.4%
Leasing Costs (Office Equipment-Vehicles)	1.0%
Depreciation—(Store Fixtures & Equipment-Vehicle Equipment)	1.0%
EDP Depreciation, Leasing and/or Purchased Service Costs	.7%
Travel & Trade Relations	.2%
Utilities (Heat, Lights, Water)	.4%
Telephone	.6%
Insurance	1.0%
Office Supplies and Postage	.4%
Rent (or Depreciation)	2.0%
Repairs and Maintenance—Building	.3%
Taxes, General	.3%
Taxes, Payroll (For all Employees)	1.4%
Employee Benefits (Includes Profit Sharing, Pension Fund, Group Insurance, & Employee Relations)	1.1%
Additional Expenses	.4%
TOTAL OPERATING EXPENSES	31.6%

Median Sales for all reporting PBE Wholesalers—$1,555,279

Median Inventory—$206,227
Turnover Rate—4.5 Turns
Days Average Inventory—79 Days
Average Sales Per Employee—$117,142

Source: 1988 Edition of Cost of Doing Business Study for ASIA PBE Wholesaler Division.

MEMA's 'Composite' Wholesalers

ASSETS	1987/86	1986/85	1985/84
Cash	5.6%	7.5%	6.5%
Accounts Receivable	14.3%	21.3%	17.2%
Inventory	45.4%	46.6%	46.2%
Total Current Assets	65.3%	75.4%	69.9%
Deferred Assets	34.7%	24.6%	30.1%
Total Assets	100.0%	100.0%	100.0%
LIABILITIES & NET WORTH			
Current Debt	31.7%	34.9%	43.4%
Long Term Debt	22.6%	11.3%	12.6%
Net Worth	45.6%	53.8%	44.0%
Total Debt & Net Worth	100.0%	100.0%	100.0%
PROFIT & LOSS STATEMENT			
Net Sales	100.0%	100.0%	100.0%
Cost of Goods Sold	70.8%	69.6%	69.5%
Gross Profit	29.2%	30.4%	30.5%
Expenses	27.5%	28.7%	28.4%
Net Profit After Taxes	1.7%	1.7%	2.1%
FINANCIAL RATIOS			
Collection Period—Days	24.3	31.6	26.8
Days Payables Outstanding	41.4	43.3	45.2
Quick Ratio	.63	.82	.54
Current Ratio	2.06	2.16	1.61
Inventory to Working Capital	135.2%	115.2%	174.7%
Inventory to Current Assets	69.5%	61.8%	66.2%
Current Debt to Inventory	69.9%	74.9%	93.9%
Current Debt to Net Worth	69.6%	64.9%	98.8%
Total Debt to Net Worth	118.5%	85.7%	126.8%
OPERATING RATIOS			
Gross Profit to Sales	29.2%	30.4%	30.5%
Net Profit to Sales	1.7%	1.7%	2.1%
Net Profit to Net Worth	8.2%	7.8%	11.1%
Net Profit to Working Capital	11.1%	10.3%	18.4%
Net Profit to Total Assets	3.7%	4.2%	4.9%
EFFICIENCY RATIOS—TIMES			
Net Sales to Net Worth	4.7	4.6	5.3
Net Sales to Working Capital	6.4	6.1	8.8
Inventory Turnover	3.4	3.7	3.5
Net Sales to Total Assets	2.2	2.5	2.3

Source: 1987 Edition of the *Automotive Distributor Trends & Financial Analysis,* published by the Motor & Equipment Manufacturers Assn.

MEMA's Profile of Average WD

ASSETS	1987/86	1986/85	1985/84
Cash	4.0%	2.7%	6.7%
Accounts Receivable	26.9%	28.4%	28.9%
Inventory	46.6%	43.0%	45.9%
Total Current Assets	77.5%	74.1%	81.5%
Deferred Assets	22.5%	25.9%	18.5%
Total Assets	100.0%	100.0%	100.0%
LIABILITIES & NET WORTH			
Current Debt	45.5%	47.3%	50.7%
Long Term Debt	16.0%	10.4%	11.3%
Net Worth	38.5%	42.3%	38.0%
Total Debt & Net Worth	100.0%	100.0%	100.0%
PROFIT & LOSS STATEMENT			
Net Sales	100.0%	100.0%	100.0%
Cost of Goods Sold	76.8%	76.4%	77.0%
Gross Profit	23.2%	23.6%	23.0%
Expenses	22.0%	22.2%	21.1%
Net Profit After Taxes	1.2%	1.4%	1.9%
FINANCIAL RATIOS			
Collection Period—Days	41.4	45.9	40.1
Days Payables Outstanding	56.9	56.4	55.8
Quick Ratio	.68	.66	.70
Current Ratio	1.7	1.57	1.61
Inventory to Working Capital	146.0%	160.3%	149.0%
Inventory to Current Assets	60.1%	58.0%	56.3%
Current Debt to Inventory	97.8%	109.9%	110.5%
Current Debt to Net Worth	118.4%	111.8%	133.3%
Total Debt to Net Worth	159.8%	136.0%	162.0%
OPERATING RATIOS			
Gross Profit to Sales	23.2%	23.6%	23.0%
Net Profit to Sales	1.2%	1.4%	1.9%
Net Profit to Net Worth	7.1%	7.7%	13.4%
Net Profit to Working Capital	8.6%	12.1%	16.6%
Net Profit to Total Assets	2.7%	3.3%	5.1%
EFFICIENCY RATIOS—TIMES			
Net Sales to Net Worth	6.2	5.4	6.9
Net Sales to Working Capital	7.4	8.4	8.5
Inventory Turnover	3.9	4.0	4.4
Net Sales to Total Assets	2.4	2.3	2.6

Source: 1987 Edition of the *Automotive Distributor Trends & Financial Analysis*, published by the Motor & Equipment Manufacturers Assn.

Operating Costs of Average WD As Percent of Net Sales: AWDA

Figures Apply to 1987 Operating Experience

	Percent of Net Sales
SALES	
Gross Sales, Merchandise	133.08%
Returned Sales & Allowances, Merchandise	−27.49%
Cash Discounts Allowed	−2.10%
Trade or Volume Discounts Allowed	−3.49%
Total Reductions	−33.08%
NET SALES	100.00%
COST OF GOODS SOLD	
Cost of Goods Sold	76.72%
Factory Transportation & Handling Charge	.29%
Cash Discounts Earned	−1.25%
Lifo Cost (Benefit)	.18%
COST OF SALES	75.94%
GROSS MARGIN	24.06%
OPERATING EXPENSES	
Selling Expenses	4.10%
(These include: salaries and/or commissions for supervisors, countermen, sales trainers; salesmen travel and trade relations costs; vehicle operation and depreciation, suppliers; advertising and sales promotion; WATS or leased line to customers.)	
Delivery and Shipping Expenses	2.38%
(These include: salaries and/or wages for supervisors, drivers; drivers' travel costs; vehicle operation and depreciation; supplies; postage; transportation out.)	
Warehouse and Occupancy Expenses	5.62%
(These include: salaries and/or wages for supervisors, warehouse employees, clerical workers; supplies; heat, light, water; rent; depreciation of buildings, land improvements, leasehold improvements, and warehouse fixtures and equipment; repairs and maintenance for buildings, fixtures and equipment.)	
General and Administrative Expenses	8.58%
TOTAL OPERATING EXPENSES	20.68%
OPERATING INCOME	3.38%
OTHER INCOME	.88%
(This includes: cash discounts earned; interest received or accrued; gain on sales of assets; service bureau fees; rental income; dividends from subsidiaries; dividend income; other.)	
OTHER EXPENSE	1.12%
(This includes: cash discounts allowed; interest paid or accrued; employees' profit sharing, employees' pension fund expenses.)	
PRETAX INCOME	3.14%

Source: 1988 *AWDA Financial Analysis Report* of the Automotive Warehouse Distributors Assn.

Relative Size of State and Regional Wholesaler Associations

1987 Rank	Association	1987 Members	1986 Rank
1	Texas	1,754	1
2	California	1,068	2
3	Florida	879	4
4	Illinois	821	3
5	Pennsylvania	745	6
6	New Jersey	649	8
7	Michigan	630	9
8	New England	580	7
9	Ohio	557	5
10	Alabama	550	10
11	North Carolina	500	13
12	Missouri/Kansas	489	11
13	New York	473	14
14	Washington	462	12
15	Kentucky	443	15
16	Louisiana	390	17
17	Oklahoma	358	16
18	Indiana	345	19
19	Chesapeake	325	26
20	Virginia	305	18
21	Georgia	301	25
22	Oregon	285	20
23	Minnesota	282	24
24	Tennessee	260	23
25	Iowa	230	21
26	Wisconsin	190	27
27	South Carolina	175	28
28	North Dakota	173	22
29	Rocky Mountains	151	31
30	New Mexico	135	29
31	Arizona	103	30
32	Arkansas	90	33
33	Mississippi	86	32
34	Idaho	75	35
35	Nebraska	66	34
36	West Virginia	40	36
37	Neveda	26	38
38	Hawaii	3	39
39	Montana	N/A	37
	TOTAL	14,994	

Source: JOBBER TOPICS Editorial.

AWDA Figures, for WD Net Profit, Turnover, Sales Per Employee

Company Size (By Dollar Vol.)	Average Net Sales Volume	Net Profit Before Taxes (Percent)	Days Sales Outstanding Accts. Rec. (Days)	Median Inventory Turns	Sales Per Employee (Dollars)
Under $4,000,000	$ 2,742,381	1.52%	44.48	3.01	$141,673
$4,000,000 to $7,000,000	5,219,897	2.59	45.42	3.18	170,122
$7,000,000 to $10,000,000	8,365,294	3.38	48.99	3.64	192,210
$10,000,000 to $15,000,000	12,209,496	2.71	52.34	3.72	177,692
Over $15,000,000	37,075,683	3.31	49.84	4.34	205,841
All Companies	$12,101,310	3.14%	47.73	3.61	$193,838

Source: 1988 *AWDA Financial Analysis Report* of the Automotive Distributors Assn.

Performance Measures For ASIA Warehouse Distributors

	Median Distributor (1987)
SALES PERFORMANCE	
Dollars of Net Sales	$5,168,586
Percent of Sales Change Over Prior Year	1.7%
Number of Manufacturers Represented	78
Number of Product Lines Represented	124
RETURN ON INVESTMENT	
Profit Margin—pre-tax	2.4%
Asset Turnover	2.2
Return on Assets—pre-tax	5.3%
Financial Leverage	1.9
Return on Net Worth—pre-tax	10.0%
PROFITABILITY PERFORMANCE	
Gross Margin (% of sales)	24.8%
Operating Profit (% of Sales)	2.5%
Profit Before Taxes (% of sales)	2.4%
Earnings Before Interest and Taxes to Total Assets (%)	6.2%
OPERATING EXPENSE CONTROL	
Total Operating Expenses (% of sales)	22.3%
Total Selling Expenses (% of sales)	4.0%
Total Delivery & Shipping Expenses (% of sales)	2.3%
Total Warehouse & Occupancy Expenses (% of sales)	5.7%
Total General Administrative Expenses (% of sales)	10.3%
PRODUCTIVITY RATIOS	
Inventory Turnover	3.1 times
Net Sales to Inventory	4.1
Gross Margin Return on Inventory	103.0%
Accounts Receivable Average Collection Period	46.3 days
Net Sales Volume per Employee	$ 178,060
Net Sales Volume per Outside Salesman	$1,554,812
Total Payroll Expense as a Percent of Net Sales	11.8%
FINANCIAL RATIOS	
Current Ratio	2.2
Quick Ratio	0.7
Accounts Payable Payout Period	49.5 days
Debt to Equity	0.9

Source: 1988 Edition of the *Cost of Doing Business Analysis for ASIA Automotive Warehouse Distributors.*

How ASIA's Heavy Duty Distributors Measured Up in Sales, Profits, Etc.

Figures Apply to 1986

	All Firms
TYPICAL SALES VOLUME ($1,000's)	$3,244,000
SALES GROWTH (1986 vs. 1985)	4.1%
PERCENTAGE PARTS SALES Generated Through Machine Shop and Drive-in Shop Operations	20.0%
NET SALES BY PROFIT CENTER	
Merchandise & Parts Sales	93.9%
Machine Shop Labor Sales	4.2
Drive-in Shop Labor Sales	1.9
Total Net Sales	100.0%
GROSS MARGIN BY PROFIT CENTER	
Merchandise & Parts Gross Margin	33.8%
Machine Shop Labor Gross Margin	47.3%
Drive-in Shop Gross Margin	46.6%
Gross Margin from Total Net Sales	34.2%
INCOME STATEMENT	
Net Sales	100.0%
Cost of Goods Sold	65.8
Gross Margin	34.2%
Operating Expenses	
Non-Shop Salaries & Wages	14.3%
Machine Shop Operating Expenses	1.8
Drive-in Shop Operating Expenses	0.0
Other Operating Expenses	14.9
Total Operating Expenses	31.0%
Operating Profit	3.2
Other Income	0.0
Interest Expense	1.0
Other Expenses	1.1
Profit Before Taxes	1.1
Income Taxes	0.3
Profit After Taxes	0.8%

Source: 1987 Edition of *Management Performance measurement for ASIA Heavy Duty Distributors,* published by the Automotive Service Industry Assn.

Productivity Measures For Machine Shop of ASIA Jobber

	Median Wholesaler (1986)
Average Number of Shop Employees	4.0
Shop Sales Per Shop Employee	$29,770
Shop Gross Profit Margin Per Shop Employee	$ 9,720

Source: 1987 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis,* published by the Automotive Service Industry Assn.

U.S.-Canadian Trade in Automotive Products, 1986-1987

Canada Imports From U.S. ($000,000)

	1986[1]	1987[1]	Percent Change
Cars	$ 6,699	$ 6,357	5.1
Trucks	2,026	2,386	17.8
Parts	13,443	12,102	10.0
Tires & Tubes	172	493	27.3
TOTAL	22,340	23,572	– 5.7

U.S. Imports From Canada ($000,000)

Cars	$11,673	$ 9,436	–19.2
Trucks	4,723	5,020	6.3
Parts	8,580	8,623	0.5
Tires & Tubes	484	493	1.9
TOTAL	25,460	23,572	– 7.4

Balance ($000,000)

Cars	$ 4,974	$ 3,079	–38.1
Trucks	2,697	2,634	– 2.3
Parts	–4,863	–3,479	–28.5
Tires & Tubes	312	274	–12.2
TOTAL	3,120	2,508	–19.6

Source: Statistics Canada. [1]Figures for 1986 and 1987 are for the first nine months.

U.S. Battery Shipments by Year

Year	Replacement	Original Equipment	Total Number
1976	49,202,906	12,551,090	61,753,996
1977	54,600,707	14,717,697	69,318,404
1978	56,389,494	15,192,304	71,581,798
1979	53,746,314	14,389,748	68,136,062
1980	50,063,224	10,018,409	60,081,633
1981	53,597,906	10,005,102	63,603,008
1982	54,214,456	8,372,942	62,587,398
1983	56,104,752	10,822,900	66,927,652
1984	59,332,509	12,765,218	72,097,727
1985	58,683,589	13,466,528	72,150,117
1986	60,306,004	13,272,013	73,578,017
1987	59,877,656	13,082,078	72,959,734

Source: Battery Council International.

Canadian Wholesalers Report Sales of $7.4 Billion in '87

Year	Vehicle Registrations	Year	Automotive Jobber Sales
1963	6,074,655	1963	$ 457,000,000
1964	6,457,850	1964	462,262,000
1965	6,698,778	1965	494,154,000
1966	7,035,261	1966	524,400,000
1967	7,495,203	1967	567,980,000
1968	7,877,547	1968	702,886,000
1969	8,254,160	1969	816,114,000
1970	8,497,339	1970	865,681,000
1971	9,022,136	1971	968,650,000
1972	9,619,400	1972	1,721,114,000
1973	10,295,000	1973	2,060,367,000
1974	10,910,000	1974	2,529,207,000
1975	11,444,643	1975	2,808,506,000
1976	11,674,000	1976	3,197,059,000
1977	12,421,000	1977	3,328,360,000
1978	12,975,000	1978	3,572,951,000
1979	13,225,000	1979	4,192,613,000
1980	13,717,152	1980	4,787,964,000
1981	13,851,482	1981	5,276,000,000
1982	14,310,717	1982	5,208,500,000
1983	14,620,648	1983	5,547,987,000
1984	14,405,972	1984	6,100,000,000[1]
1985	14,213,300	1985	6,300,000,000[1]
1986	14,633,000	1986	6,867,000,000[1]
		1987	7,402,626,000[1]

Source: Statistics Canada. [1]Automotive Jobber Sales figures for 1984, 1985 , 1986 and 1987 were provided by the Automotive Industries Assn. of Canada.

Productivity of People Working For ASIA Heavy Duty Distributors

	All Firms
EMPLOYEE PRODUCTIVITY	
Total Sales per Employee	$115,500
Merchandise & Parts Sales per Non-Shop Employee	$154,700
Merchandise & Parts Sales per Outside Sales Employee	$737,000
Machine Shop Sales per Machine Shop Employee	$ 43,500
Drive-in Shop Sales per Drive-in Shop Employee	$ 38,300
EXECUTIVE COMPENSATION	
Highest Paid Executive (Salary & Bonus)	$ 59,543
2nd Highest Paid Executive (Salary & Bonus)	$ 40,000
2nd Highest Paid Executive as a percent of the Highest Paid Executive	68.7%
Non-shop Salaries & Wages as a percent of Merchandise & Parts Sales	16.1%
Non-shop Salaries & Wages per Non-Shop Employee	$ 23,900
EMPLOYEES BY FUNCTION	
Machine Shop	3.0
Drive-in Shop	5.0
Outside Sales	4.5
Other Non-shop	21.0
Total Employees	33.5

Source: 1987 Edition of *Management Performance measurement for ASIA Heavy Duty Distributors,* published by the Automotive Service Industry Assn.

Latest Financial Rankings of

Automobile Parts—Miscellaneous

Figures Apply to 1986 With Certain Exceptions, As Noted

RANK	COMPANY	REVENUES ($ MILL.) '87 AMT
1	Echlin, Inc..	1,099.70
2	Federal-Mogul Corp.	1,075.40
3	SPX Corp.	774.20
4	Intermark, Inc.	496.00[2]
5	Bearings, Inc.	491.00[2]
6	Standard Products Co.	464.90[2]
7	Standard Motor Products	356.40
8	Modine Manufacturing Co.	349.00[2]
9	Allen Group, Inc.	348.20
10	Lamson & Sessions Co.	340.40
11	Wynn's International, Inc.	312.90
12	Douglas & Lomason Co.	296.70
13	Facet Enterprises, Inc.	279.30
14	Kysor Industrial Corp.	226.90
15	Sparton Corp.	224.30[2]
16	LSB Industries, Inc.	169.10[2]
17	Trico Products Corp.	157.60[2]
18	Superior Industries	148.60[2]
19	Simpson Industries, Inc.	146.80
20	Raytech Corp.	132.50
21	Twin Disc, Inc.	129.70[2]
22	Champion Parts	118.10
23	Arrow Automotive	102.90[2]
24	Larizza Industries, Inc.	100.50
25	Cascade Corp.	98.70[2]
26	Republic Automotive	89.60
27	Hastings Manufacturing	61.70[2]
28	Redlaw Industries, Inc.	53.40
29	Howell Industries, Inc.	51.00
30	Valley Forge Corp.	32.70[2]
31	Metex Corp.	31.00
32	Chief Automotive Sys.	30.90[2]

RANK	COMPANY	NET INCOME ($ MILL.) '87 AMT
1	Echlin, Inc.	45.60
2	Federal-Mogul Corp.	41.10
3	Standard Products Co.	31.50[2]
4	SPX Corp.	26.10
5	Modine Manufacturing Co.	19.60[2]
6	Standard Motor Products	16.30
7	Kysor Industrial Corp.	12.60
8	Trico Products Corp.	12.60[2]
9	Wynn's International Inc.	11.80
10	Larizza Industries, Inc.	10.70
11	Sparton Corp.	10.00[2]
12	Superior Industries	8.50[2]
13	Chief Automotive Sys.	7.60[2]
14	Bearings, Inc.	6.20[2]
15	Douglas & Lomason Co.	6.20
16	Cascade, Corp.	5.60[2]
17	Simpson Industries, Inc.	5.30
18	Raytech Corp.	5.20
19	Howell Industries, Inc.	3.90
20	Facet Enterprises, Inc.	3.80
21	Redlaw Industries, Inc.	3.50
22	LSB Industries, Inc.	2.60[2]
23	Allen Group, Inc.	2.40
24	Twin Disc, Inc.	2.30[2]
25	Intermark, Inc.	2.20[2]
26	Hastings Manufacturing	1.40[2]
27	Champion Parts	1.00
28	Valley Forge Corp.	0.80[2]
29	Metex Corp.	0.20
30	Arrow Automotive	0.40[2]
31	Lamson & Sessions Co.	0.70
32	Republic Automotive	2.50

Automobile Parts—Major

RANK	COMPANY	REVENUES ($ MILL.) '86 AMT
1	Eaton Corp.	3,811.60
2	Dana Corp.	3,695.10
3	Genuine Parts Co.	2,394.10
4	Cummins Engine Co., Inc.	2,303.70
5	Trinova Corp.	1,447.30
6	Timken Co.	1,230.30[3]
7	Arvin Industries, Inc.	995.60
8	Smith (A.O.) Corp.	970.40[3]
9	Champion Spark Plug Co.	883.80
10	Barnes Group, Inc.	439.70
11	Acklands Ltd.	278.70
12	Cardis Corp.	228.30
13	Mr. Gasket Co.	115.00
14	Walbro Corp.	102.80

RANK	COMPANY	NET INCOME ($ MILL.) '86 AMT
1	Eaton Corp.	137.60
2	Genuine Parts Co.	121.60
3	Dana Corp.	85.90
4	Arvin Industries, Inc.	41.20
5	Trinova Corp.	36.20
6	Barnes Group, Inc.	16.60
7	Smith (A.O.) Corp.	15.40[3]
8	Timken Co.	10.30[3]
9	Walbro Corp.	6.20
10	Acklands Ltd.	2.80
11	Mr. Gasket Co.	5.00
12	Champion Spark Plug Co.	17.20
13	Cardis Corp.	17.30
14	Cummins Engine Co., Inc.	107.30

Publicly-Owned Automotive Firms

Automobile Parts—Miscellaneous

Figures Apply to 1986 With Certain Exceptions, As Noted

OPERATING PROFIT MARGIN (%)

RANK	COMPANY	'86 AMT
1	Chief Automative Sys.	20.80
2	Larizza Industries, Inc.	12.90
3	Standard Products Co.	12.50
4	Howell Industries Inc.	11.90[1]
5	Standard Motor Products	11.30
6	Modine Manufacturing Co.	11.20
7	Cascade Corp.	10.60
8	SPX Corp.	9.60
9	Superior Industries	9.10
10	Sparton Corp.	8.80
11	Valley Forge Corp.	8.60
12	Federal-Mogul Corp.	8.20
13	Kysor Industries Corp.	7.70
14	Echlin, Inc.	6.80[1]
15	Hastings Manufacturing	5.80
15	Reytech Corp.	5.80
17	Champion Parts	5.70
17	Wynn's International, Inc.	5.70
19	Facet Enterprises, Inc.	5.20
20	Intermark, Inc.	4.80
20	LSB Industries, Inc.	4.80
22	Douglas & Lonsaon Co.	4.50[1]
23	Metex Corp.	4.50
24	Simpson Industries, Inc.	4.30
25	Bearings, Inc.	2.80
26	Twin Disc, Inc.	2.40
27	Allen Group, Inc.	2.00
28	Trico Products Corp.	1.90
29	Redlaw Industries, Inc.	1.40[1]
30	Arrow Automotive	0.50
31	Lamson & Sessions Co.	..
32	Republic Automotive	0.40[1]
	Average	6.60

RETURN ON CAPITAL (%)

RANK	COMPANY	'86 AMT
1	Larizza Industries, Inc.	27.12
2	Howell Industries, Inc.	24.85[1]
3	Standard Products Co.	19.71
4	Sparton Corp.	15.46
5	Chief Automotive Sys.	15.31
6	Trico Products Corp.	13.22
7	Redlaw Industries, Inc.	12.38[1]
8	Kysor Industries Corp.	11.30
9	Modine Manufacturing Co.	11.29
10	Superior Industries	10.39
11	Cascade Corp.	9.57
12	Standard Motor Products	9.48
13	Raytech Corp.	9.05
14	Douglass & Lomason Co.	7.67[1]
15	LSB Industries, Inc.	7.16
16	Echlin, Inc.	6.51[1]
16	SPX Corp.	6.51
18	Wynn's International, Inc.	4.92
19	Hastings Manufacturing	4.57
20	Metex Corp.	4.43
21	Valley Forge Corp.	3.92
22	Bearings, Inc.	3.56
23	Twin Disc, Inc.	2.96
24	Facet Enterprises, Inc.	2.14[1]
25	Champion Parts	1.16
26	Simpson Industries, Inc.	0.99
27	Intermark, Inc.	0.69
28	Federal-Mogul Corp.	0.40
29	Allen Group, Inc.	..
29	Arrow Automotive.	..
29	Lamson & Sessions Co.	..
29	Republic Automotive	..
	Average	7.70

Automobile Parts—Major

OPERATING PROFIT MARGIN (%)

RANK	COMPANY	'86 AMT
1	Walbro Corp.	11.00
2	Genuine Parts Co.	10.00
3	Barnes Group, Inc.	9.80
4	Arvin Industries, Inc.	8.70
5	Dana Corp.	7.00
6	Eaton Corp.	6.20
7	Trinova Corp.	5.80
8	Smith (A.O.) Corp.	5.60
9	Mr. Gasket Co.	4.10
10	Acklands Ltd.	3.50
11	Cummins Engine Co., Inc.	0.20
12	Champion Spark Plug Co.	0.01
13	Cardis Corp.	..
13	Timken Co.	..
	Average	5.10

RETURN ON CAPITAL (%)

RANK	COMPANY	'86 AMT
1	Genuine Parts Co.	15.16
2	Walbro Corp.	14.68
3	Barnes Group, Inc.	10.21
4	Smith (A.O.) Corp.	7.05
5	Arvin Industries, Inc.	6.85
6	Eaton Corp.	6.37
7	Dana Corp.	4.85
8	Trinova Corp.	2.97
9	Acklands Ltd.	2.08
10	Timken Co.	0.27
11	Cardis Corp.	..
11	Champion Spark Plug Co.	..
11	Cummins Engine Co., Inc.	..
11	Mr. Gasket Co.	..
	Average	5.00

Source: Moody's Industry Review, published by Moody's Investors Service. [1]Figures apply to 1986. [2]Figures apply to 1987. [3]Fiscal year ends 8-31.

U.S. Car Production:

	Total Output 1987	Pct. of Total Output	Total Output 1986	Pct. of Total Output	Pct. pt. Change '87 vs. '86
CHRYSLER MOTORS	**1,109,411**	**15.64**	**1,337,094**	**17.08**	**−1.44**
Eagle Total	15,994	0.23	49,435	0.63	−0.40
Alliance	15,994	0.23	46,088	0.59	−0.36
Encore	0	0.00	3,347	0.04	−0.04
Plymouth Total	321,585	4.53	422,618	5.40	−0.87
Horizon	45,663	0.64	171,882	2.20	−1.56
Sundance	89,678	1.26	36,855	0.47	+0.79
Reliant	136,109	1.92	151,695	1.94	−0.02
Caravelle	42,955	0.61	44,368	0.57	+0.04
Gran Fury	7,180	0.10	17,818	0.23	−0.13
Chrysler Total	357,148	5.03	368,637	4.71	+0.32
Laser	0	0.00	25,327	0.32	−0.32
LeBaron	64,089	0.90	83,163	1.06	−0.16
LeBaron J	113,858	1.60	4,043	0.05	+1.55
LeBaron GTS	37,508	0.53	68,699	0.88	−0.35
N. Yorker E-Class	57,102	0.80	64,964	0.83	−0.03
N. Yorker C-Class	18,916	0.27	0	0.00	+0.27
Fifth Avenue	65,675	0.93	122,441	1.56	−0.63
Dodge Total	414,684	5.85	496,404	6.34	−0.49
Daytona	64,054	0.90	33,097	0.42	+0.48
Omni	40,039	0.56	163,416	2.09	−1.53
Shadow	96,073	1.36	35,107	0.45	+0.91
Aries	127,948	1.81	126,311	1.61	+0.20
Dodge 600	39,773	0.56	64,063	0.82	−0.26
Lancer	23,123	0.33	47,817	0.61	−0.28
Dynasty	8,486	0.12	0	0.00	+0.12
Diplomat	15,188	0.21	26,593	0.34	−0.13
FORD MOTOR	**1,830,446**	**25.80**	**1,764,316**	**22.53**	**+3.27**
Ford Division	1,317,787	18.57	1,221,956	15.61	+2.96
Escort	394,704	5.56	378,359	4.83	+0.73
Mustang	214,153	3.02	177,737	2.27	+0.75
Tempo	145,779	2.05	198,808	2.54	−0.49
Taurus	405,644	5.72	335,669	4.29	+1.43
Thunderbird	157,507	2.22	131,383	1.68	+0.54
L-M Division	512,659	7.23	542,360	6.93	+0.30
Mercury Total	328,509	4.63	359,325	4.59	+0.04
Lynx	21,351	0.30	60,246	0.77	−0.47
Capri	0	0.00	12,344	0.16	−0.16
Topaz	47,008	0.66	57,576	0.74	−0.08
Cougar	138,464	1.95	101,829	1.30	+0.65
Sable	121,686	1.72	127,330	1.63	+0.09
Lincoln Total	184,150	2.60	183,035	2.33	+0.27
Continental	13,595	0.19	19,628	0.25	−0.06
Lincoln	142,005	2.00	137,286	1.75	+0.25
Mark VII	28,550	0.40	26,121	0.33	+0.07
GENERAL MOTORS	**3,455,463**	**48.70**	**4,124,730**	**52.68**	**−3.98**
Buick Total	552,601	7.79	775,966	9.91	−2.12
Skyhawk	34,516	0.49	82,429	1.05	−0.56
Century	152,898	2.16	230,137	2.94	−0.78
Regal	40,425	0.57	60,897	0.78	−0.21
Skylark/Somerset	63,612	0.90	112,773	1.44	−0.54
LeSabre (fwd)	142,635	2.01	156,869	2.00	+0.01
LeSabre (rwd)	10,230	0.14	15,192	0.19	−0.05
Electra	94,485	1.33	91,559	1.17	+0.16

1987 Compared to 1986

	Total Output 1987	Pct. of Total Output	Total Output 1986	Pct. of Total Output	Pct. pt. Change '87 vs. '86
Reatta	332	0.00	0	0.00	0.00
Riveria	13,468	0.19	26,110	0.33	−0.14
Cadillac Total	275,737	3.89	319,096	4.08	−0.19
Cimarron	10,404	0.15	23,247	0.30	−0.15
Allante	4,665	0.07	53	0.00	+0.07
Brougham (rwd)	73,195	1.03	76,469	0.98	+0.05
DeVille (fwd)	145,540	2.05	171,607	2.19	−0.14
Eldorado	20,538	0.29	25,246	0.32	−0.03
Seville	21,395	0.30	22,474	0.29	+0.01
Chevrolet Total	1,372,633	19.35	1,310,710	16.74	+2.61
Chevette	0	0.00	105,488	1.35	−1.35
Camaro	121,551	1.71	172,585	2.20	−0.49
Cavalier	315,319	4.44	395,154	5.05	−0.61
Celebrity	285,111	4.02	257,983	3.29	+0.73
Corsica/Beretta	348,806	4.92	17,200	0.22	+4.70
Monte Carlo	72,749	1.03	110,048	1.41	−0.38
Caprice	200,583	2.83	223,842	2.86	−0.03
Corvette	28,514	0.40	28,410	0.36	+0.04
Oldsmobile Total	597,257	8.41	927,173	11.84	−3.43
Firenza	17,988	0.25	38,212	0.49	−0.24
Calais	115,085	1.62	120,629	1.54	+0.08
Cutlass Ciera	108,766	1.53	236,613	3.02	−1.49
Cutlass Supreme	76,751	1.08	107,036	1.37	−0.29
88 (fwd)	178,747	2.52	272,318	3.48	−0.96
88 (rwd)	10,463	0.15	19,028	0.24	−0.09
Olds 98	73,004	1.03	114,558	1.46	−0.43
Toronado	16,453	0.23	18,779	0.24	−0.01
Pontiac Total	657,235	9.26	791,785	10.11	−0.85
Acadian[1]	0	0.00	16,539	0.21	−0.21
Fiero	33,936	0.48	69,735	0.89	−0.41
Pontiac 1000	0	0.00	16,814	0.21	−0.21
Firebird	77,731	1.10	105,109	1.34	−0.24
Sunbird	89,465	1.26	130,167	1.66	−0.40
Grand Am	247,661	3.49	231,318	2.95	+0.54
Grand Prix	6,343	0.08	0	0.00	+0.08
Pontiac 6000	67,947	0.96	132,385	1.69	−0.73
Bonneville	125,005	1.76	39,886	0.51	+1.25
Safari/Paris	9,147	0.13	49,832	0.64	−0.51
HONDA	**324,064**	**4.57**	**248,159**	**3.17**	**+1.40**
Civic	88,445	1.25	34,348	0.44	+0.81
Accord	235,619	3.32	213,811	2.73	+0.59
MAZDA	**4,200**	**0.06**	**0**	**0.00**	**+0.06**
NISSAN	**117,334**	**1.65**	**65,147**	**0.83**	**+0.82**
NUMMI	**187,378**	**2.64**	**205,854**	**2.63**	**+0.01**
Corolla	43,726	0.62	14,318	0.18	+0.44
Nova	143,652	2.02	191,536	2.45	−0.43
VOLKSWAGEN	**66,696**	**0.94**	**84,397**	**1.08**	**−0.14**
Golf/GTI	47,157	0.66	83,247	1.06	−0.40
Jetta	19,539	0.28	1,150	0.01	+0.27
Total Cars U.S.	**7,094,992**	**100.00**	**7,829,697**	**100.00**	

Source: Reprinted by permission from Automotive News, Copyright 1988. [1]Built for sale in Canada only.

Scrappage of Motor Vehicles

(During One-Year Periods Ending June 30)

	Passenger Cars	Trucks	Cars & Trucks
July 1, 1946 – June 30, 1947	478,048	(36,328)	441,720
July 1, 1947 – June 30, 1948	855,517	307,660	1,163,177
July 1, 1948 – June 30, 1949	1,220,041	484,245	1,704,286
July 1, 1949 – June 30, 1950	2,313,813	517,054	2,830,867
July 1, 1950 – June 30, 1951	3,713,417	660,008	4,373,425
July 1, 1951 – June 30, 1952	3,137,989	531,835	3,669,824
July 1, 1952 – June 30, 1953	2,465,936	615,932	3,081,868
July 1, 1953 – June 30, 1954	3,491,000	780,513	4,271,513
July 1, 1954 – June 30, 1955	3,247,436	467,659	3,715,095
July 1, 1955 – June 30, 1956	4,312,759	596,257	4,909,016
July 1, 1956 – June 30, 1957	4,309,153	630,303	4,939,456
July 1, 1957 – June 30, 1958	4,221,607	502,245	4,723,852
July 1, 1958 – June 30, 1959	2,981,641	372,085	3,353,726
July 1, 1959 – June 30, 1960	4,348,719	690,568	5,039,287
July 1, 1960 – June 30, 1961	4,294,118	646,791	4,940,909
July 1, 1961 – June 30, 1962	4,360,774	575,903	4,936,677
July 1, 1962 – June 30, 1963	4,741,017	720,039	5,461,056
July 1, 1963 – June 30, 1964	5,319,286	779,870	6,099,156
July 1, 1964 – June 30, 1965	5,704,373	735,975	6,440,348
July 1, 1965 – June 30, 1966	6,173,512	1,073,593	7,247,105
July 1, 1966 – June 30, 1967	6,984,214	946,649	7,930,863
July 1, 1967 – June 30, 1968	6,200,017	860,542	7,060,559
July 1, 1968 – June 30, 1969	6,348,488	966,003	7,314,491
July 1, 1969 – June 30, 1970	7,460,984	837,173	8,298,157
July 1, 1970 – June 30, 1971	6,021,041	1,043,877	7,064,918
July 1, 1971 – June 30, 1972	7,058,029	1,048,031	8,106,060
July 1, 1972 – June 30, 1973	7,987,384	1,207,536	9,194,920
July 1, 1973 – June 30, 1974	7,193,679	1,047,207	8,240,886
July 1, 1974 – June 30, 1975	5,668,708	907,699	6,576,407
July 1, 1975 – June 30, 1976	6,828,903	1,097,457	7,926,360
July 1, 1976 – June 30, 1977	8,233,925	1,667,653	9,901,578
July 1, 1977 – June 30, 1978	7,907,075	1,426,294	9,333,369
July 1, 1978 – June 30, 1979	9,312,274	1,916,142	11,228,416
July 1, 1979 – June 30, 1980	8,404,993	1,731,670	10,136,663
July 1, 1980 – June 30, 1981	7,542,480	1,518,546	9,061,026
July 1, 1981 – June 30, 1982	6,921,273	1,458,795	8,380,068
July 1, 1982 – June 30, 1983	6,242,544	1,490,971	7,733,515
July 1, 1983 – June 30, 1984	6,674,928	1,601,889	8,276,817
July 1, 1984 – June 30, 1985	7,728,594	2,100,120	9,828,714
July 1, 1985 – June 30, 1986	8,442,465	2,309,090	10,751,555
July 1, 1985 – June 30, 1986	8,103,356	2,363,980	10,467,336

Source: R. L. Polk & Co., Motor Statistical Division. Note: Adjustments for the absence of Oklahoma and other states have been made where applicable.

Imported New-Car Sales in U.S. Since 1980

	1987	1986	1985	1984	1983	1982	1981	1980
Acura	109,470	52,869	—	—	—	—	—	—
Alfa Romeo	6,320	8,201	4,502	3,702	3,002	2,194	2,301	3,000
Aston Martin	64	74	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.
Audi	41,322	59,797	74,061	71,237	47,936	45,954	50,817	42,483
Bertone	845	1,482	N.A.	N.A.	—	—	—	—
BMW	87,839	96,759	87,832	70,897	59,242	52,393	41,761	37,071
Capri	—	—	—	—	—	—	—	—
Chevrolet Spectrum	76,852	99,380	53,968	2,077	—	—	—	—
Chevrolet Sprint	60,359	60,983	30,892	10,927	—	—	—	—
Chrysler Conquest	11,217	2,572	—	—	—	—	—	—
DeLorean	—	—	—	—	—	2,830	3,009	—
Dodge Colt	41,787	48,249	39,724	36,560	39,158	75,031	42,796	50,689
Dodge Conquest	234	2,335	2,716	3,725	14,024	14,128	12,690	12,924
Dodge Vista	15,336	18,101	12,023	7,805	2,311	—	—	—
Eagle	13,991	4,152	7,205	12,243	33,229	37,540	30,869	25,365
Fiat	—	—	—	—	6,184	14,113	32,185	37,814
Ferrari	1,054	771	N.A.	N.A.	N.A.	N.A.	N.A.	779
Fiesta	—	—	—	—	—	—	32,856	68,595
Ford	26,750	—	—	—	—	—	—	—
Honda	312,218	405,399	406,413	374,819	350,670	365,865	370,705	375,388
Hyundai	263,610	168,882	—	—	—	—	—	—
Isuzu	39,587	38,910	26,953	17,233	20,731	15,462	17,805	—
Jaguar	22,919	24,464	20,528	18,044	15,815	10,349	4,695	3,029
Lamborghini	124	107	26	N.A.	N.A.	N.A.	N.A.	N.A.
Lancia	—	—	—	—	637	1,174	1,068	2,100
Lotus	170	149	—	—	—	—	—	—
Maserati	920	1,334	1,190	2,023	—	—	—	—
Mazda	206,354	222,676	211,093	169,666	173,388	163,150	166,105	161,623
Mercedes-Benz	89,918	99,314	89,098	79,222	73,692	65,963	63,059	53,790
Merkur	14,301	14,315	8,975	—	—	—	—	—
MG	—	—	—	—	—	3,712	13,370	26,025
Mitsubishi	67,954	49,436	49,734	39,104	32,755	3,950	—	—
Nissan	405,996	494,294	535,372	485,298	521,902	470,246	464,805	516,890
Opel	—	—	—	—	—	—	—	—
Peugeot	9,422	14,296	15,636	20,007	15,241	14,323	16,725	12,930
Plymouth Colt	37,580	45,094	36,491	32,819	34,513	—	42,128	55,474
Plymouth Conquest	138	2,182	2,671	3,344	11,571	13,068	13,326	10,263
Plymouth Vista	14,044	16,995	11,588	7,465	1,992	—	—	—
Pontiac LeMans	35,564	—	—	—	—	—	—	—
Porsche	23,632	30,471	25,306	20,024	21,831	14,407	11,241	10,490
Rolls-Royce	1,208	1,155	1,110	1,083	1,046	N.A.	1,158	942
Rover	—	—	—	—	—	—	481	—
Saab	45,106	48,246	39,068	33,631	26,323	18,463	14,613	13,558
Sterling	14,171	—	—	—	—	—	—	—
Subaru	175,864	179,100	178,175	157,385	156,840	150,335	152,062	142,968
Toyota	583,809	633,914	620,047	557,981	555,766	530,246	576,491	582,204
Triumph	—	—	—	—	—	—	9,768	14,939
Volkswagen	130,641	143,319	140,505	103,479	77,009	67,350	82,173	90,952
Volvo	106,539	113,267	104,267	99,541	88,857	72,375	64,477	56,999
Yugo	48,812	35,959	3,895	—	—	—	—	—
Total	3,144,042	3,239,043	2,841,063	2,443,144	2,386,064	2,221,817	2,326,300	2,396,934

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Annual U.S. Motor Vehicle Production And Factory Sales

Year	Production			Factory Sales		
	Passenger Cars	Motor Trucks and Buses	Total Vehicles	Passenger Cars	Motor Trucks and Buses	Total Vehicles
1987	7,098,910	3,810,672	10,909,582	7,085,147	3,821,410	10,906,557
1986	7,828,783	3,490,176	11,318,959	7,516,189	3,392,885	10,909,074
1985	8,184,821	3,467,922	11,652,743	8,002,259	3,356,905	11,359,164
1984	7,773,332	3,151,449	10,924,781	7,621,176	3,075,325	10,696,501
1983	6,781,184	2,443,637	9,224,821	6,739,223	2,413,897	9,153,120
1982	5,073,496	1,912,099	6,985,595	5,049,184	1,906,455	6,955,639
1981	6,253,138	1,689,778	7,942,916	6,255,340	1,700,908	7,956,248
1980	6,375,506	1,634,335	8,009,841	6,400,026	1,667,283	8,067,309
1979	8,433,662	3,046,331	11,479,993	8,419,226	3,036,706	11,455,932
1978	9,176,635	3,722,567	12,899,202	9,165,190	3,706,239	12,871,429
1977	9,213,654	3,489,128	12,702,782	9,200,849	3,441,521	12,642,370
1976	8,497,893	2,999,703	11,497,596	8,500,305	2,979,476	11,479,781
1975	6,716,951	2,269,562	8,986,513	6,712,852	2,272,160	8,985,012
1974	7,324,504	2,746,538	10,071,042	7,331,256	2,727,313	10,058,569
1973	9,667,152	3,014,361	12,681,513	9,657,647	2,979,688	12,637,335
1972	8,828,205	2,482,503	11,310,708	8,823,938	2,446,807	11,270,745
1971	8,583,653	2,088,001	10,671,654	8,584,592	2,053,146	10,637,738
1970	6,550,128	1,733,821	8,283,949	6,546,817	1,692,440	8,239,257
1969	8,224,392	1,981,519	10,205,911	8,223,715	1,923,179	10,146,984
1968	8,848,620	1,971,790	10,820,410	8,822,158	1,896,078	10,718,236
1967	7,412,659	1,611,077	9,023,736	7,436,764	1,539,462	8,976,226
1966	8,604,712	1,791,586	10,396,298	8,598,326	1,731,084	10,329,410
1965	9,335,227	1,802,603	11,137,830	9,305,561	1,751,805	11,057,366
1964	7,745,492	1,562,368	9,307,860	7,751,822	1,540,453	9,292,275
1963	7,644,377	1,464,399	9,108,776	7,637,728	1,462,708	9,100,436
1962	6,943,334	1,253,977	8,197,311	6,933,240	1,240,168	8,173,408
1961	5,522,019	1,130,919	6,652,938	5,542,707	1,133,804	6,676,511
1960	6,703,108	1,202,011	7,905,119	6,674,796	1,194,475	7,869,271
1959	5,599,492	1,124,096	6,723,588	5,591,243	1,137,386	6,728,629
1955	7,950,377	1,253,672	9,204,049	7,920,186	1,249,106	9,169,292
1950	6,628,598	1,377,261	8,005,859	6,665,863	1,337,193	8,003,056
1945	83,786	701,090	784,876	69,532	655,683	725,215
1940	3,728,491	784,404	4,512,895	3,717,385	754,901	4,472,286
1935	3,252,244	694,690	3,946,934	3,273,874	697,367	3,971,241
1930	2,784,745	571,241	3,355,986	2,787,456	575,364	3,362,820
1925	N.A.	N.A.	N.A.	3,735,171	530,659	4,265,830
1920	N.A.	N.A.	N.A.	1,905,560	321,789	2,227,349
1915	N.A.	N.A.	N.A.	895,930	74,000	969,930
1910	N.A.	N.A.	N.A.	181,000	6,000	187,000
1905	N.A.	N.A.	N.A.	24,250	750	25,000
1900	N.A.	N.A.	N.A.	4,192	—	4,192

Source: Motor Vehicle Manufacturers Assn. of the U.S., Inc., and Ward's Automotive Reports. N.A.—Not available.

What It Costs to Own, Operate Average Car in 1987

Figures Based on Composite Costs*

Cost Per Mile

Cost Item	1987
Gasoline and oil	5.0 cents
Tires	.8 cents
Maintenance	1.6 cents

Fixed Costs Per Year

Comprehensive insurance ($100 ded.)	$ 78.00
$250 deductible collision insurance	$ 194.00
Property damage and liability ($100/300/50M)	$ 284.00
License, registration, taxes	$ 131.00
Depreciation	$1,778.00
Finance charge (20% down, 11.0% for 4 years)	$ 523.00
TOTAL COST PER MILE	27.3 cents
TOTAL COST PER YEAR	$4,099.00

Source: American Automobile Association. The AAA study used cars that were equipped with standard and optional accessories, automatic transmission, power steering, power disc brakes, AM/FM stereo, cruise control and rear window defogger. Gasoline costs were based on a $1.081-per-gallon charge for regular unleaded fuel. Insurance figures in the study were based on personal use of vehicles; cars were driven less than 10 miles to or from work, with no young drivers. Normal depreciation costs were based on the car's trade-in value at the end of four years or at 60,000 miles. For cars driven 10,000 miles per year, depreciation costs were based on six years or 60,000. *The costs for operating a Ford Escort, Chevrolet Celebrity and Chevrolet Caprice were averaged to arrive at these figures.

United States Car Production By Calendar Year, 1959 to 1987

1987	7,094,992
1986	7,829,697
1985	8,186,040
1984	7,777,721
1983	7,112,352
1982	4,973,870
1981	6,280,045
1980	6,416,885
1979	8,418,369
1978	9,153,299
1977	9,293,674
1976	8,537,759
1975	6,740,584
1974	7,309,763
1973	9,667,118
1972	8,827,706
1971	8,557,878
1970	6,550,077
1969	8,224,267
1968	8,848,507
1967	7,412,610
1966	8,604,726
1965	9,335,208
1964	7,744,888
1963	7,644,359
1962	6,943,470
1961	5,522,004
1960	6,703,086
1959	5,599,471

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U.S. Car Output by Calendar Year

(By Size Classification)

SUBCOMPACT

1987 Position	1987 Total	Make	1986 Total	1986 Position
1	394,704	Escort	378,359	1
2	143,652	Nova	191,536	2
3	117,334	Sentra	65,147	7
4	88,445	Civic	34,348	10
5	47,157	Golf/GTI	83,247	6
6	45,663	Horizon	171,882	3
7	43,726	Corolla FX-16	14,318	13
8	40,039	Omni	163,416	4
9	21,351	Lynx	60,246	8
10	15,994	Alliance	46,088	9
—	—	Chevette	105,488	5
—	—	Acadian	16,539	12
—	—	Pontiac 1000	16,814	11
—	—	Encore	3,347	14
	958,065	Total	1,350,775	

COMPACT

1	315,319	Cavalier	395,154	1
2	247,661	Grand Am	231,318	2
3	235,619	Accord	213,811	3
4	145,779	Tempo	198,808	4
5	136,109	Reliant	151,695	5
6	127,948	Aries	126,311	7
7	115,085	Calais	120,629	8
8	96,073	Shadow	35,107	16
9	89,678	Sundance	36,855	15
10	89,465	Sunbird	130,167	6
11	64,089	LeBaron K	83,163	10
12	64,054	Daytona	33,097	17
13	63,612	Skylark/Somerset	112,773	9
14	47,008	Topaz	57,576	13
15	39,773	Dodge 600	64,063	12
16	34,516	Skyhawk	82,429	11
17	19,539	Jetta	1,150	20
18	17,988	Firenza	38,212	14
19	10,404	Cimarron	23,247	19
20	4,200	Mazda MX-6	—	—
—	—	Laser	25,327	18
	1,963,919	Total	2,160,892	

INTERMEDIATE

1	405,644	Taurus	335,669	1
2	348,806	Corsica/Beretta	17,200	25
3	285,111	Celebrity	257,983	2
4	214,153	Mustang	177,737	5
5	157,507	Thunderbird	131,383	8
6	152,898	Century	230,137	4
7	138,464	Cougar	101,829	13

INTERMEDIATES (CONT.)

1987 Position	1987 Total	Make	1986 Total	1986 Position
8	121,686	Sable	127,330	9
9	121,551	Camaro	172,585	6
10	113,858	LeBaron J	4,043	27
11	108,766	Cutlass Ciera	236,613	3
12	77,731	Firebird	105,109	12
13	76,751	Cutlass Supreme	107,036	11
14	72,749	Monte Carlo	110,048	10
15	67,947	Pontiac 6000	132,385	7
16	57,102	New Yorker E	64,964	15
17	42,955	Caravelle	44,368	18
18	40,425	Regal	60,897	16
19	37,508	LeBaron GTS	68,699	14
20	28,550	Mark VII	26,121	19
21	23,123	Lancer	47,817	17
22	21,395	Seville	22,474	22
23	20,538	Eldorado	25,246	21
24	18,916	New Yorker C	—	—
25	16,453	Toronado	18,779	24
26	13,595	Continental	19,628	23
27	13,468	Riviera	26,110	20
28	8,486	Dynasty	—	—
29	6,343	Grand Prix	—	—
—	—	Capri	12,344	26
	2,812,479	Total	2,684,534	

STANDARD

1	200,583	Caprice	223,842	2
2	178,747	Olds 88 (fwd)	272,318	1
3	145,540	DeVille	171,607	3
4	142,635	LeSabre (fwd)	156,869	4
5	142,005	Lincoln	137,286	5
6	125,005	Bonneville	39,886	11
7	94,485	Electra	91,559	8
8	73,195	Brougham	76,469	9
9	73,004	Olds 98	114,558	7
10	65,675	Fifth Avenue	122,441	6
11	15,188	Diplomat	26,593	12
12	10,463	Olds 88 (rwd)	19,028	13
13	10,230	LeSabre (rwd)	15,192	15
14	9,147	Parisienne	49,832	10
15	7,180	Gran Fury	17,818	14
	1.293.082	Total	1,535,298	

SPECIALTY

1	33,936	Fiero	69,735	1
2	28,514	Corvette	28,410	2
3	4,665	Allante	53	3
4	332	Reatta	—	—
	67,447	Total	98,198	
	7,094,992	Grand Total	7,829,697	

Source: Reprinted by permission from *Automotive News*, Copyright 1988.

1986 Motor Bus Registration

State	Private and Commercial		Publicly Owned			
	Commercial Buses[1]	School and Other[2]	Federal	School[3]	Total School Buses	Total Buses
Alabama	1,947	180	36	6,196	6,378	8,361
Alaska	1,148	497	67	275	772	1,987
Arizona	1,095	201	349	2,517	2,718	4,162
Arkansas	45	1,086	26	4,013	5,099	5,170
California	12,866	8,552	416	13,978	22,530	35,812
Colorado	668	842	43	4,022	4,864	5,575
Connecticut	2,470	5,498	11	669	6,167	8,648
Delaware	330	1,276	5	151	1,427	1,762
Florida	3,532	1,105	185	29,386	30,491	34,208
Georgia	1,184	2,247	94	12,411	14,658	15,936
Hawaii	2,591	683	25	696	1,379	3,995
Idaho	792	397	155	1,971	2,368	3,315
Illinois	5,477	10,884	76	2,781	13,665	19,218
Indiana	3,888	4,743	49	10,166	14,909	18,846
Iowa	1,110	269	12	6,850	7,119	8,241
Kansas	373	1,153	12	2,282	3,435	3,820
Kentucky	1,138	729	141	7,621	8,350	9,629
Louisiana	805	14,389	22	4,453	18,842	19,669
Maine	163	440	11	2,008	2,458	2,632
Maryland	2,738	3,859	135	4,107	7,966	10,839
Massachusetts	3,586	6,626	74	343	6,969	10,629
Michigan	2,449	6,334	70	13,270	19,604	22,123
Minnesota	2,169	3,949	7	7,283	11,232	13,408
Mississippi	796	2,215	72	5,174	7,389	8,257
Missouri	1,028	2,902	32	6,060	8,962	10,022
Montana	349	717	19	764	1,481	1,849
Nebraska	482	576	9	3,208	3,784	4,275
Nevada	1,328	153	132	112	265	1,725
New Hampshire	364	944	2	262	1,206	1,572
New Jersey	5,000	8,000	58	3,000	11,000	16,058
New Mexico	526	2,464	290	540	3,004	3,820
New York	12,577	7,067	197	11,901	18,968	31,742
North Carolina	1,958	7,246	51	23,218	30,464	32,473
North Dakota	86	444	63	1,395	1,839	1,988
Ohio	7,889	3,291	75	19,883	23,174	31,138
Oklahoma	385	1,441	125	10,300	11,741	12,251
Oregon	1,349	2,154	63	5,796	7,950	9,362
Pennsylvania	8,092	14,232	110	6,126	20,358	28,560
Rhode Island	303	1,249	5	6	1,255	1,563
South Carolina	905	3,733	21	8,701	12,434	13,360
South Dakota	305	393	113	1,180	1,573	1,991
Tennessee	1,760	1,371	69	9,299	10,670	12,499
Texas	3,166	12,354	224	39,616	51,970	55,360
Utah	320	75	36	710	785	1,141
Vermont	85	496	4	775	1,271	1,360
Virginia	2,262	243	207	11,936	12,179	14,648
Washington	761	2,068	178	4,763	6,831	7,770
West Virginia	910	64	40	2,625	2,689	3,639
Wisconsin	1,491	6,621	21	3,995	10,616	12,128
Wyoming	831	143	9	1,421	1,564	2,404
District of Columbia	2,315	154	219	100	254	2,788
Total	110,187	158,759	4,465	320,317	479,076	593,728

Source: U.S. Department of Transportation, Federal Highway Administration, Table MV-10. [1]Includes municipally-owned transit buses. [2]In some instances, church, industrial and other private buses are included here; and in other instances, privately-owned school buses could not be segregated from commercial buses, and are included with the latter. [3]This column consists primarily of publicly-owned school buses but includes a few privately-owned school, institutional and industrial buses registered free or at a reduced rate.

United States Motor Truck Registrations by State

State	Privately Owned[1] 1985	Privately Owned[1] 1986	Privately and Publicly Owned[2] 1985	Privately and Publicly Owned[2] 1986
Alabama	963,759	903,860	986,190	926,530
Alaska	123,815	125,989	131,541	134,027
Arizona	634,836	679,769	648,252	693,480
Arkansas	469,537	482,501	478,634	491,823
California	3,961,247	4,170,939	4,141,597	4,359,648
Colorado	715,414	720,387	736,642	741,460
Connecticut	131,192	131,989	150,065	151,369
Delaware	91,715	96,782	94,004	99,264
Florida	1,864,452	1,954,726	1,979,875	2,064,010
Georgia	1,175,195	1,283,162	1,206,299	1,317,816
Hawaii	73,627	79,177	77,825	83,171
Idaho	299,166	298,950	318,586	318,869
Illinois	1,577,909	1,316,374	1,602,478	1,339,619
Indiana	988,217	1,010,734	1,016,507	1,039,331
Iowa	728,500	714,000	749,021	735,211
Kansas	653,165	659,153	669,875	675,867
Kentucky	792,787	826,175	831,631	866,576
Louisiana	909,065	915,261	925,327	931,722
Maine	206,103	216,094	216,990	224,482
Maryland	527,113	558,845	544,096	576,433
Massachusetts	431,408	452,978	458,423	480,341
Michigan	1,284,577	1,324,363	1,347,957	1,388,441
Minnesota	716,384	661,526	742,734	681,582
Mississippi	392,078	396,207	408,430	411,402
Missouri	911,548	972,167	925,969	986,572
Montana	244,141	225,790	255,807	237,464
Nebraska	404,885	412,001	417,108	423,702
Nevada	184,333	199,575	196,025	211,566
New Hampshire	149,899	167,290	158,741	175,942
New Jersey	410,000	412,000	480,308	482,431
New Mexico	409,351	470,885	425,859	487,586
New York	1,055,186	1,111,041	1,108,618	1,162,423
North Carolina	1,126,779	1,198,832	1,171,537	1,245,190
North Dakota	263,817	257,331	271,945	265,431
Ohio	1,277,163	1,360,355	1,324,115	1,408,688
Oklahoma	964,295	979,438	997,242	1,012,884
Oregon	614,051	606,344	634,081	625,897
Pennsylvania	1,245,015	1,309,554	1,291,791	1,357,937
Rhode Island	84,691	93,737	89,583	98.592
South Carolina	506,846	534,759	525,079	553,811
South Dakota	233,277	242,218	244,196	253,291
Tennessee	761,025	784,895	796,906	822,248
Texas	3,658,087	3,673,375	3,827,880	3,851,276
Utah	346,845	348,839	358,016	359,859
Vermont	90,891	99,143	94,831	103,106
Virginia	572,481	880,057	597,700	906,736
Washington	1,000,247	1,100,903	1,031,478	1,133,582
West Virginia	321,880	320,297	358,198	355,756
Wisconsin	683,791	676,903	716,876	710,480
Wyoming	203,052	178,865	211,114	187,037
District of Columbia	10,028	9,672	15,060	14,538
TOTAL	37,444,865	38,606,207	38,989,042	40,166,499

Source: U.S. Department of Transportation, Federal Highway Administration, Table MV-1. [1]Excludes farm trucks registered in certain states and restricted to use in vicinity of owner's farm. There were 65,154 such trucks in the 1986 count. [2]Includes federal, state, county and municipal vehicles; excludes vehicles owned by military services. Note: Registrations shown here are not synonymous with vehicles in use since the latter implies a count of vehicles in operation on a specific date or an average for a period of time, while registrations are a count of transactions (with transfers eliminated) during a specified period.

Franchised New Car Dealers' Service and Parts Sales

Year	Millions of Dollars	Percent Change
1977	$18,526	10.8
1978	20,462	10.5
1979	23,142	13.1
1980	22,703	−1.9
1981	23,116	1.8
1982	24,447	5.8
1983	26,363	7.8
1984	29,820	13.1
1985	32,078	7.6
1986	34,042	6.1
1987	37,664	10.6

Source: National Automobile Dealers Assn, Industry Analysis Division.

Services Warehouse Distributors Provide for Their Jobbers

(Percent of Forum Survey Respondents)

	Program Group Members	Non-Members	All
Co-op advertising/promotion programs	92.1	46.2	58.3
(Wholesale)	73.7	34.0	44.4
(Retail)	63.2	21.7	32.6
Clinics	89.5	50.9	61.1
(For jobber dealer customers)	89.5	48.1	59.0
(For jobber DIY customers)	21.1	1.9	6.9
Computerized ordering	60.5	28.3	36.8
Delivery service	94.7	75.5	80.6
(Daily)	84.2	56.6	63.9
(Weekly)	10.5	20.8	18.1
(Other)	13.2	1.9	11.1
Display units, gondolas	73.7	28.3	40.3
Financial assistance	63.2	26.4	36.1
Inventory control assistance	79.0	52.8	59.7
Management assistance/counseling	76.3	34.0	45.1
Obsolescence protection	94.7	67.9	75.0
Point-of-sale materials	81.6	57.6	63.9
Private branding	84.2	20.8	37.5
Repair manuals	60.5	19.8	30.6
Signage, inside/outside	81.6	24.5	39.6
Store layout assistance	65.8	20.8	32.6
Training programs	71.1	34.0	43.8
(For jobber outside sales personnel)	44.7	19.8	26.4
(For jobber counter personnel)	63.2	30.2	38.9

Source: Forum Survey Report on WD Marketing Practices, published in August 1986 JOBBER TOPICS.

How Wholesalers Rank Shows And Meetings

Forum Survey Question: If you could have attended one show or meeting in the past year, which one would you have selected?

	Percent of Forum Survey Respondents			
	Small Firms[1]	Medium Firms[1]	Large Firms[1]	All Firms
Big "I" (IAAS)	6.5	14.6	28.9	20.8
State Assn. show, meetings	12.9	9.1	13.4	12.0
PAS	0.0	5.4	5.1	4.4
AWDA	0.0	5.5	4.1	3.8
AERA	6.5	1.8	4.1	3.8
APAA	0.0	1.8	2.1	1.6
SEMA/Auto Internacional	3.2	3.6	0.0	1.6
Other	6.4	20.0	18.6	17.0
No Answer	64.5	38.2	23.7	35.0

Source: Forum Survey Report on Jobbers' Views of Shows and Meetings, published in January 1987 JOBBER TOPICS. [1]Small Firms are those with sales under $350,000; Medium Firms have sales from $350,000 to $750,000; Large Firms have sales over $750,000.

World Vehicle Production and Assembly By Region—10 Years

	North America	Europe	Asia	South America
1987	12,777,111	17,653,244	13,256,075	1,113,554
1986	13,461,068	16,706,054	13,835,201	1,231,098
1985	14,006,178	15,901,217	12,880,368	1,104,300
1984	13,145,741	15,215,560	11,759,738	977,419
1983	11,015,273	15,682,826	11,486,316	1,055,457
1982	8,734,684	14,787,194	11,047,858	992,709
1981	9,862,814	14,412,699	11,462,754	952,199
1980	9,874,206	15,412,225	11,279,345	1,454,124
1979	13,556,095	16,269,079	9,941,266	1,394,210
1978	15,101,822	16,097,613	9,524,417	1,256,884

Source: Reprinted by permission from *Automotive News*, Copyright 1988. Definitions: North America—Canada, Mexico, U.S.; Europe—Western Europe and Eastern Bloc including U.S.S.R.; Asia—India, Japan, Korea; South America—Argentine, Brazil. Totals will not match with other production tables because of CKD kits.

U.S. Trade in Motor Vehicle Parts And Accessories: 1982-86

(In Thousands of Dollars)

	1982	1983	1984	1985	1986
Total Exports	$10,641,745	$11,045,080	$13,836,159	$14,270,471	$13,039,040
Total Imports	9,112,226	12,597,206	16,980,573	18,947,124	21,200,940
Trade Balance	1,529,519	−1,552,118	−3,144,414	−4,676,653	−8,161,900
U.S.-Japan Trade Balance					
Exports to Japan	127,847	148,386	179,205	191,000	203,400
Imports from Japan	1,822,344	2,112,954	2,939,927	3,000,000	3,838,500
Trade Balance	−1,694,497	−1,964,586	−2,769,722	−2,796,600	−3,635,100

Source: U.S. International Trade Commission.

Trailer, Truck Tractor and Light Truck Registration

	Private and Commercial Trailers[1]					
	Commercial Trailers[2]	Light Farm & Car Trailers	House Trailers[3]	Total Trailers	Truck Tractors[4]	Light Trucks[5]
Alabama	45,591	36,360	53,699	135,650	31,222	807,691
Alaska	10,504	39,607	—	50,111	2,305	117,068
Arizona	50,343	133,489	64,299	248,131	8,265	649,896
Arkansas	39,885	233,789	14,394	288,068	13,273	428,317
California	525,086	698,776	409,709	1,633,571	66,363	3,306,974
Colorado	50,079	148,918	62,194	261,191	7,462	638,161
Connecticut	23,675	126,166	—	149,841	2,990	116,345
Delaware	13,902	24,933	—	38,835	5,294	82,167
Florida	129,761	742,800	555,157	1,427,718	79,484	1,788,397
Georgia	84,210	295,901	20,884	400,995	42,173	1,165,458
Hawaii	3,473	14,815	—	18,288	1,056	73,569
Idaho	14,508	91,159	31,251	136,918	6,876	252,353
Illinois	79,790	309,597	80,948	470,335	41,546	1,043,809
Indiana	72,381	215,008	57,637	345,026	49,410	791,591
Iowa	39,520	220,400	44,080	304,000	40,300	582,800
Kansas	62,426	18,031	14,185	94,642	19,162	539,129
Kentucky	39,566	25,361	25,359	90,286	17,893	729,835
Louisiana	204,135	202,622	11,495	418,252	17,056	851,050
Maine	374,157	99,432	—	473,589	4,908	187,416
Maryland	16,100	155,378	—	171,478	13,246	490,093
Massachusetts	24,642	188,116	—	212,758	12,321	396,904
Michigan	80,901	587,458	93,994	762,353	48,470	1,106,712
Minnesota	89,563	403,198	74,574	567,335	16,410	497,788
Mississippi	26,180	56,773	8,377	91,330	14,166	341,486
Missouri	61,817	352,984	—	414,801	29,675	848,841
Montana	2,748	71,152	31,699	105,599	1,894	188,468
Nebraska	38,274	142,139	—	180,413	18,889	312,951
Nevada	4,250	58,631	23,935	86,816	2,279	189,048
New Hampshire	9,212	99,133	—	108,345	4,466	154,719
New Jersey	52,000	248,000	—	300,000	27,000	343,434
New Mexico	39,327	41,913	51,636	132,876	11,890	438,293
New York	35,768	440,882	—	476,650	27,304	965,767
North Carolina	76,775	224,950	7,989	309,714	50,180	1,038,127
North Dakota	15,832	32,309	60	48,201	8,183	182,266
Ohio	161,588	294,133	107,294	563,015	42,905	1,170,032
Oklahoma	62,085	54,537	15,553	132,175	26,432	851,532
Oregon	44,313	139,168	120,108	303,589	15,224	506,544
Pennsylvania	79,054	290,215	140,067	509,336	38,110	1,051,371
Rhode Island	6,460	28,136	—	34,596	2,035	82,281
South Carolina	30,355	25,379	117	55,851	12,182	491,097
South Dakota	21,806	66,476	20,947	109,229	7,810	214,223
Tennessee	34,951	36,657	83	71,691	27,961	715,634
Texas	192,481	1,137,433	—	1,329,914	123,385	3,364,285
Utah	11,556	54,266	38,178	104,000	9,666	316,076
Vermont	2,060	45,628	—	47,688	1,297	89,476
Virginia	64,371	131,870	56,384	252,625	29,694	833,701
Washington	139,034	294,445	88,693	522,172	14,171	972,085
West Virginia	18,849	37,334	27,220	83,403	3,293	295,986
Wisconsin	53,733	2,347	30,525	86,605	20,592	580,232
Wyoming	8,046	66,718	20,281	95,045	3,148	140,502
Dist. of Columbia	95	1,019	—	1,114	101	8,075
Total	3,367,218	9,485,941	2,403,005	15,256,164	1,121,417	33,330,055

Source: U.S. Department of Transportation, Federal Highway Administration. Tables MV-9 and MV-11. [1]The reporting of data on trailer registration varies greatly. Data are reported to the extent available. [2]Includes all commercial type trailers and semitrailers that are in private or for-hire use. [3]Mobile homes and house trailers are shown in this column for states which require them to be registered and are able to segregate them from other trailers. In states where this classification is not available, house trailers are included with light car trailers. [4]Data may include some large trucks used regularly in combination with full trailers. [5]Includes pickups, panels, and delivery vans generally of 10,000 pounds or less gross vehicle weight.

U.S. Van and Light Truck Output, '87 vs. '86

	Total '87 Output	% of '87 Output	Total '86 Output	% of '86 Output
CHEVROLET	1,131,875	33.13	1,179,406	37.98
Chevy Van/Sportvan	96,387	2.82	149,426	4.81
S-10	229,405	6.72	185,879	5.99
S-10 Blazer	170,671	4.99	140,733	4.53
Blazer	34,431	1.01	38,588	1.24
Astro	163,508	4.79	148,336	4.78
Suburban	67,889	1.99	64,204	2.07
Pickups	323,421	9.46	417,381	13.44
P Models	46,163	1.35	34,859	1.12
CHRYSLER	221,727	6.49	178,385	5.75
Dakota	109,220	3.20	59,699	1.92
Pickups	112,507	3.29	92,556	2.99
Ramcharger*	—	0.00	26,130	0.84
FORD	1,418,071	41.51	1,105,890	35.62
Aerostar	187,875	5.50	107,459	3.46
Bronco	57,013	1.67	39,102	1.26
Bronco II	135,760	3.97	73,908	2.38
Econoline/Club Wagon	236,622	6.93	149,298	4.81
Pickups	482,794	14.13	540,126	17.40
Ranger	318,007	9.31	195,997	6.31
GMC	329,089	9.63	325,700	10.49
Vandura/Rally Vans	26,927	0.79	23,773	0.77
S-15	59,300	1.73	63,192	2.03
S-15 Jimmy	51,510	1.51	46,471	1.50
Jimmy	9,499	0.28	9,443	0.30
Safari	41,302	1.21	39,006	1.26
Suburban	26,407	0.77	25,883	0.83
Pickups	107,221	3.14	105,517	3.40
P Models	6,823	0.20	12,415	0.40
JEEP	212,816	6.23	207,514	6.68
Wrangler/CJ**	—	0.00	35,267	1.14
Wagoneer	15,033	0.44	12,800	0.41
Cherokee	139,295	4.08	107,225	3.44
Grand Wagoneer	14,265	0.42	17,254	0.56
Commanche	43,070	1.26	33,386	1.08
Pickups	1,153	0.03	1,515	0.05
Scrambler	—	0.00	67	0.00
NISSAN	102,718	3.01	108,116	3.48
Pickups	102,718	3.01	108,116	3.48
TOTAL	3,416,296	100.00	3,105,011	100.00

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Profile of Establishments

State	Establishments Having Machine Shops	Paint/ Body Supplies	Heavy Duty Parts Supplies	Tires/ Accessories
Ala.	190	203	168	72
Alaska	7	20	21	8
Ariz.	126	95	116	42
Ark.	114	207	165	53
Calif.	853	478	655	220
Colo.	127	122	139	45
Conn.	112	114	112	43
Del.	21	26	19	7
D. of C.	6	5	4	2
Fla.	448	358	409	206
Ga.	220	282	275	77
Hawaii	25	44	23	17
Idaho	63	75	87	22
Ill.	555	515	403	174
Ind.	331	380	275	86
Iowa	200	339	247	94
Kan.	153	200	167	57
Ky.	161	234	149	67
La.	150	166	159	83
Maine	48	111	68	24
Md.	116	127	115	53
Mass.	209	220	169	68
Mich.	448	501	333	153
Minn.	213	258	191	76
Miss.	94	153	114	56
Mo.	274	324	243	107
Mont.	48	99	81	17
Neb.	113	147	106	31
Nev.	20	27	36	19
N.H.	52	84	48	20
N.J.	352	197	181	111
N.M.	558	578	474	259
N.Y.	55	56	81	30
N.C.	51	72	52	19
N.D.	240	367	268	128
Ohio	533	591	388	160
Okla.	134	155	137	54
Ore.	132	124	125	45
Pa.	463	679	424	221
R.I.	35	37	42	11
S.C.	61	74	48	18
S.D.	144	181	121	59
Tenn.	234	273	212	81
Texas	577	549	597	238
Utah	36	57	49	18
Vt.	23	53	33	13
Va.	141	265	230	96
Wash.	219	150	196	64
W. Va.	64	136	96	35
Wis.	259	310	183	87
Wyo.	29	57	50	13
TOTAL	9,839	10,876	9,089	3,762

Source: JOBBER TOPICS Circulation Files. Note: The sum of column total exceeds JOBBER TOPICS total circulation due to multiple mentions.

Influenced by JOBBER TOPICS

Hi-Performance Products	Ignition/ Electrical	Equipment/ Tools	Import Car Parts/ Supplies	Retail Sales	State
196	375	269	310	296	Ala.
16	38	32	32	33	Alaska
69	235	134	203	202	Ariz.
112	306	227	239	234	Ark.
533	1,443	911	1,332	1,199	Calif.
117	278	196	235	233	Colo.
88	238	177	210	198	Conn.
8	44	35	36	28	Del.
1	13	8	12	9	D. of C.
408	875	557	730	678	Fla.
298	520	372	428	393	Ga.
27	70	44	73	69	Hawaii
82	151	100	117	119	Idaho
341	950	634	656	736	Ill.
208	572	400	390	438	Ind.
194	471	331	284	369	Iowa
172	365	264	253	305	Kan.
115	329	235	238	199	Ky.
120	352	234	261	280	La.
42	135	93	103	119	Maine
80	277	180	206	194	Md.
109	428	276	331	328	Mass.
352	755	511	469	680	Mich.
131	358	277	253	273	Minn.
83	236	177	189	202	Miss.
252	566	409	430	481	Mo.
56	130	104	100	97	Mont.
79	215	162	125	175	Neb.
20	60	40	48	50	Nev.
403	112	86	94	89	N.H.
33	502	327	423	386	N.J.
59	1,084	774	827	823	N.M.
145	127	88	100	97	N.Y.
313	102	82	61	77	N.C.
31	640	435	517	411	N.D.
263	905	596	611	724	Ohio
142	330	238	225	286	Okla.
118	229	164	207	178	Ore.
334	1,030	716	712	756	Pa.
19	82	61	66	65	R.I.
156	87	70	61	69	S.C.
33	292	212	256	216	S.D.
189	434	274	356	289	Tenn.
494	1,330	825	968	1,110	Texas
56	112	79	92	83	Utah
21	66	51	56	48	Vt.
207	457	307	363	288	Va.
184	372	238	318	311	Wash.
59	162	122	121	106	W. Va.
146	439	295	272	342	Wis.
46	71	59	52	64	Wyo.
7,762	19,750	13,489	15,055	15,437	TOTAL

U.S.-Car Retail Outlets

1947 to 1988

Date	No. of Retail Outlets	Pct. Gain or Loss from Previous Year
Jan. 1, 1947	45,580	—
Jan. 1, 1948	46,092	+1.12
Jan. 1, 1949	49,173	+6.66
Jan. 1, 1950	46,821	−4.78
Jan. 1, 1951	47,543	+1.54
Jan. 1, 1952	46,014	−3.22
Jan. 1, 1953	45,191	−1.79
Jan. 1, 1954	41,910	−7.26
Jan. 1, 1955	40,374	−3.66
Jan. 1, 1956	41,018	+1.60
Jan. 1, 1957	37,982	−7.40
Jan. 1, 1958	37,188	−2.09
Jan. 1, 1959	35,077	−5.68
Jan. 1, 1960	33,658	−4.05
Jan. 1, 1961	32,482	−3.49
Jan. 1, 1962	31,331	−3.54
Jan. 1, 1963	30,853	−1.53
Jan. 1, 1964	30,827	−0.08
Jan. 1, 1965	30,691	−0.44
Jan. 1, 1966	30,278	−1.35
Jan. 1, 1967	28,422	−6.14
Jan. 1, 1968	27,784	−2.24
Jan. 1, 1969	27,486	−1.07
Jan. 1, 1970	27,071	−1.51
Jan. 1, 1971	26,126	−3.49
Jan. 1, 1972	25,621	−1.93
Jan. 1, 1973	25,441	−0.70
Jan. 1, 1974	25,349	−0.36
Jan. 1, 1975	24,980	−1.46
Jan. 1, 1976	24,453	−2.11
Jan. 1, 1977	24,268	−0.76
Jan. 1, 1978	24,147	−0.50
Jan. 1, 1979	24,051	−0.40
Jan. 1, 1980	23,379	−2.79
Jan. 1, 1981	21,772	−6.87
Jan. 1, 1982	20,834	−4.31
Jan. 1, 1983[1]	19,985	−4.08
Jan. 1, 1984	20,076	+0.46
Jan. 1, 1985	20,152	+0.38
Jan. 1, 1986	19,946	−1.02
Jan. 1, 1987	19,700	−1.23
Jan. 1, 1988	19,530	−0.86

Source: Reprinted by permission from *Automotive News*, Copyright 1988. [1]Figures for Jan. 1, 1983 through Jan. 1, 1988 include Renault.

International Show 'Stats,' by Years

Year	Place	Exhibitors	Booths	Net Square Ft. (Booth Space)	Attendance Total
1933	Chicago	268	562	62,324	10,781
1934	Cleveland	336	798	72,261	13,348
1935	Atlantic City	350	850	92,400	12,761
1936	Chicago	357	915	98,632	13,476
1937	Chicago	380	1,012	110,095	13,045
1938	Chicago	355	947	103,412	15,526
1939	Chicago	351	961	108,413	13,366
1940	Chicago	352	969	117,331	12,925
1946	Atlantic City	430	1,169	126,888	13,712
1947	Chicago	486	1,327	171,978	19,888
1948	Chicago	520	1,444	178,510	19,534
1950	Chicago	522	1,385	172,463	17,067
1952	Atlantic City	460	1,275	143,148	14,049
1953[2]	Chicago	289	440	44,000	4,288
1954[3]	Chicago	478	984	111,978	12,880
1959	Chicago	459	1,004	118,404	21,614
1960	New York	487	1,143	119,066	34,087
1961	Los Angeles	511	1,157		44,309[4]
1962	Chicago	504	1,275	146,926	29,090
1963	Philadelphia	518	1,347	138,844	22,975
1964	San Francisco	579	1,415		53,165[4]
1965	Chicago	542	1,422	148,980	18,177
1966	New York	505	1,139	116,887	17,640
1967	Chicago	548	1,419	146,050	17,379
1968	Las Vegas	560	1,488		19,512
1969	Chicago	516	1,403	145,220	18,449
1970	Las Vegas	576	1,514	136,780	21,157
1971	Chicago	496	1,407	140,700	18,989
1972	Chicago	526	1,444	158.000	20,226
1973	Las Vegas	559	1,579	157,900	25,190
1974	Chicago	510	1,523	157,450	17,219
1975	Chicago	542	1,523	157,550	20,824
1976	San Francisco	560	1,525	152,500	21,795
1977	Chicago	579	1,643	165,200	20,958
1978	Chicago	646	[5]	193,650	23,877
1979	Las Vegas	746	2,016	201,600	28,237
1980	Chicago	684	[5]	201,880	23,156
1981	Chicago	659	[5]	191,000	23,765
1982	Las Vegas	756	2,035	203,500	27,480
1983	Chicago	639	1,921	192,130	30,572
1984	Chicago	705	[5]	201,950	32,822[6]
1985	Las Vegas	791	2,215	221,500	30,555
1986	Chicago	728	[5]	221,300	35,428
1987	Atlanta	801	[5]	233,050	25,329
1988	Las Vegas	761	2,303	230,300	30,761

Sources: Hall-Erickson, Inc. and JOBBER TOPICS. [1]The exhibit is commonly called the Big "I" Show when staged in Chicago, but International Automotive Aftermarket Show when staged in Las Vegas or other western sites. When held in Las Vegas, the show is co-sponsored by ASIA and MEMA, presented by PAS. [2]Indicates booth conference only. [3]Indicates trade show plus booth conference. [4]Attendance figures for 1961 and 1964 are "turnstyle" counts, not an actual badge count. For years 1962 through 1983 the figure is a badge count. [5]Show officials discontinued reporting the number of show booths for the years indicated. [6]Attendance figure based on total registrations, not a badge count.

United States Car Production By Model Year, 1959 to 1987

1987	7,375,359
1986	7,890,392
1985	7,975,390
1984	8,102,269
1983	5,768,893
1982	5,447,135
1981	6,639,954
1980	7,085,480
1979	9,526,024
1978	8,995,418
1977	9,159,100
1976	8,114,376
1975	6,523,880
1974	8,125,488
1973	9,915,802
1972	8,589,049
1971	7,221,290
1970	7,595,411
1969	8,440,765
1968	8,402,870
1967	7,666,898
1966	8,606,166
1965	7,882,679
1964	7,892,090
1963	7,339,992
1962	6,686,749
1961	5,407,256
1960	6,011,482
1959	5,566,527

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Shipments Of Passenger Car Tires

Year	Original Equipment	Replacement	Export	Total
1976	49,905,133	122,999,524	4,104,659	177,009,316
1977	55,667,960	129,283,293	4,600,816	189,552,114
1978	54,962,674	135,151,410	3,752,806	193,866,890
1979	48,188,000	121,922,000	3,909,000	174,019,000
1980	34,932,806	106,912,217	4,074,250	145,919,273
1981[1]	35,979,000	125,263,000	4,017,000	165,259,000
1982	33,981,000	130,539,000	2,949,000	167,469,000
1983	43,845,000	133,964,000	4,206,000	182,015,000
1984	50,993,000	144,580,000	6,064,000	201,637,000
1985	54,838,000	141,455,000	4,625,000	200,918,000
1986	54,392,000	144,267,000	4,032,000	202,691,000
1987	52,913,000	151,892,000	5,987,000	210,792,000

Source: *Rubber Manufacturers Association.* [1]Figures have been adjusted to include those manufacturers, both foreign and domestic, that do not report to RMA. 1982 and subsequent totals include Volkswagen. 1983 and subsequent totals includes Renault.

Vehicle Production Milestones[1]

(Cars, Trucks & Buses Combined)

1906	100,000th
1912	1 millionth
1920	10 millionth
1931	50 millionth
1948	100 millionth
1955	150 millionth
1962	200 millionth
1968	250 millionth
1972	300 millionth
1982	400 millionth

Source: Motor Vehicle Manufacturers Assn. of the U.S., Inc., and *Ward's Automotive Reports.* [1]Based upon U.S. total factory sales data.

Car Production Milestones[1]

1912	1 millionth
1920	10 millionth
1935	50 millionth
1952	100 millionth
1960	150 millionth
1967	200 millionth
1972	250 millionth
1979	300 millionth
1986	350 millionth

Source: Motor Vehicle Manufacturers Assn. of the U.S., Inc., and *Ward's Automotive Reports.* [1]Based upon U.S. total factory sales data.

Truck and Bus Production Milestones[1]

1915	100,000th
1918	500,000th
1920	1 millionth
1929	5 millionth
1938	10 millionth
1953	25 millionth
1971	50 millionth
1979	75 millionth

Source: Motor Vehicle Manufacturers Assn. of the U.S., Inc., and *Ward's Automotive Reports.* [1]Based upon U.S. total factory sales data.

Product Statistics Section

The following section of the JOBBER TOPICS 54th Annual Marketing Directory contains 12 pages of product statistics. Harvey Research Organization, an independent research firm located in Rochester, NY, was commissioned to conduct this survey to determine automotive jobbers' impact on the American economy. The twelve product lines come from ASIA's 1986 Leading Line Study.

A dollar incentive and two mailings yielded a 57 percent rate of return, offering assurance that the statistical results within this survey may be accepted as accurate within +/- 3 percentage points at the 95% confidence level.

Each page features one product line with survey results covering: product performance by jobber sales volume and geographical region; approximate percentage of product sold for domestic versus import use; percentage of product sold to garages, service stations, tire dealers, DIYers and others; and the percentage of respondents purchasing the product from a warehouse distributor versus direct from the manufacturer.

Finally, an analysis of product line sales volume is offered, based on ASIA's percentage of total jobber sales. It should be noted that these figures are rough estimates, combining fresh data from JOBBER TOPICS with ASIA's 1986 Leading Lines survey. However, because the circulation of JOBBER TOPICS magazine truly reflects the universe of wholesalers in this country, and because this Harvey Research study is statistically projectable for this sample, these dollar sales volume estimates are a good approximation of real industry figures.

The Editors

Alternators & Generators

Product Performance By Sales Volume

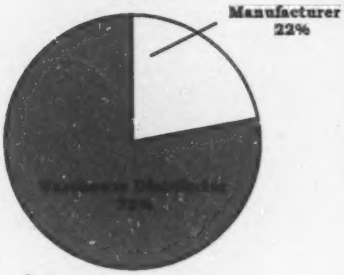
Dollar Sales	Jobber Sales Volume: Less Than $250,000	$250,000 to $500,000	$500,000 or more
Increased	28%	36%	46%
Decreased	28%	19	13
Steady	44	40	34

Domestic/Import Sales Mix

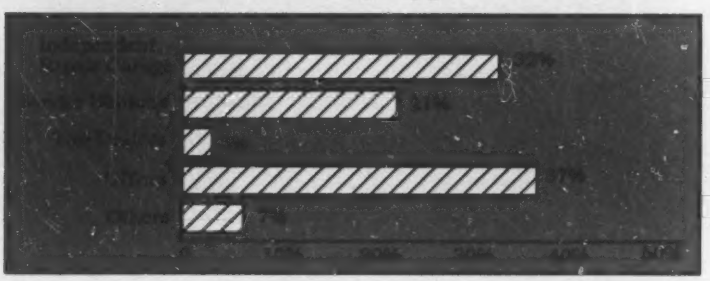
Product Performance By Region

Dollar Sales	Geographic Regions: 1	2	3	4	5	6	7	8	9
Increased	47%	40%	31%	35%	46%	27%	33%	39%	27%
Decreased	9	9	14	16	21	15	22	31	23
steady	43	51	55	41	32	58	42	31	43

Jobber's Supplier



Product Performance By Type of Customer

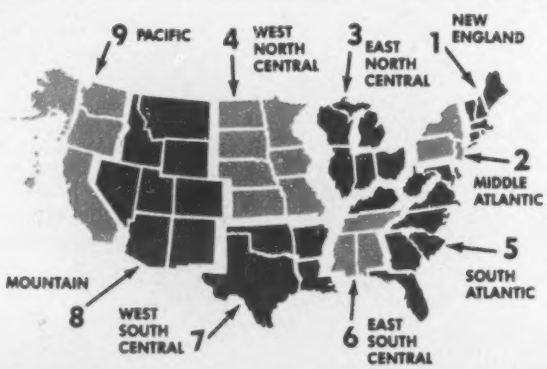


Analysis:

According to ASIA's 1986 Leading Line survey, alternators, generators and starter motors account for 2.85% of total sales. The median annual sales volume for a jobber is $467,000. Therefore, the average jobber sells $13,310 worth of alternators, generators and starter motors each year.

Based on 26,636 jobbing facilities in U.S., the wholesale alternator, generator and starter motor market represents $354,511,842.

Regions:



Methodology:

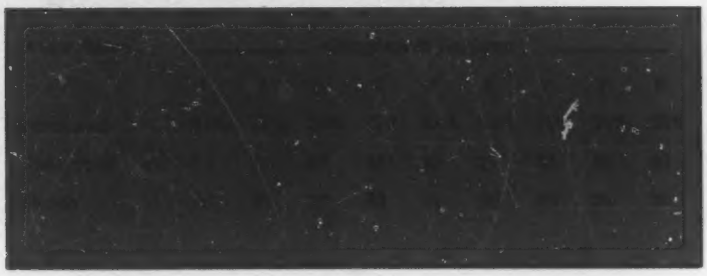
An independent mail survey conducted by Harvey Research of Rochester, NY. Based on a random sample of 1,500 JOBBER TOPICS readers. A dollar incentive and a follow-up mailing earned a 57% return. These figures are statistically projectable within +/-3 percentage points at the 95% confidence level.

Ball Joints, Control Arms

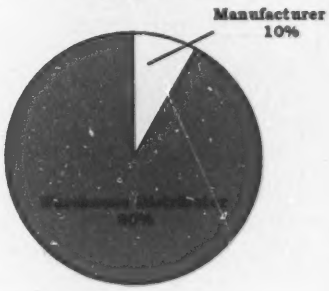
Product Performance By Sales Volume

Domestic/Import Sales Mix

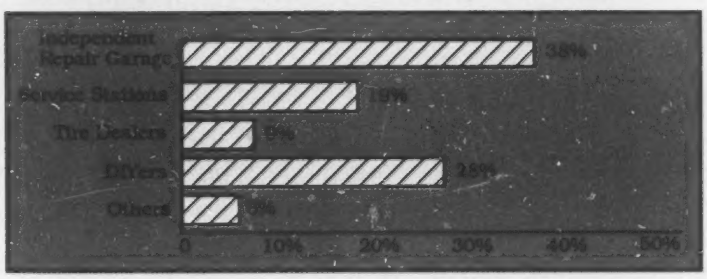
Product Performance By Region



Jobber's Supplier



Product Performance By Type of Customer

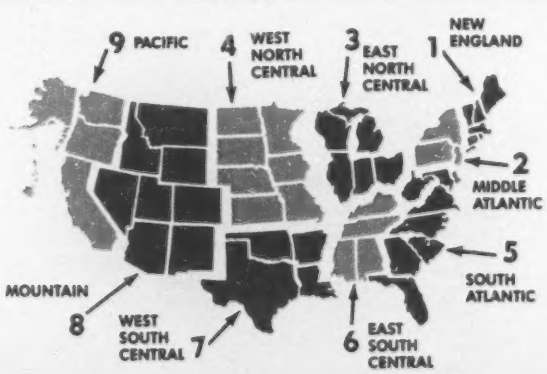


Analysis:

According to ASIA's 1986 Leading Line survey, ball joints and control arms account for 1.82% of total sales. The median annual sales volume for a jobber is $467,000. Therefore, the average jobber sells $8,499 worth of ball joints and control arms each year.

Based on 26,636 jobbing facilities in U.S., the wholesale ball joint and control arm market represents $226,390,018.

Regions:



Methodology:

An independent mail survey conducted by Harvey Research of Rochester, NY. Based on a random sample of 1,500 JOBBER TOPICS readers. A dollar incentive and a follow-up mailing earned a 57% return. These figures are statistically projectable within +/-3 percentage points at the 95% confidence level.

Engine Bearings

Product Performance By Sales Volume

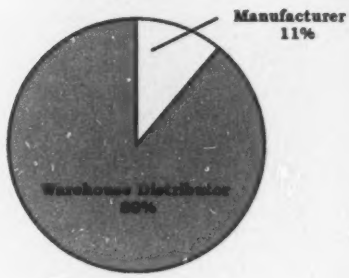
Dollar Sales	Jobber Sales Volume: Less Than $350,000	$350,000 to $550,000	$550,000 or more
Increased	16%	28%	25%
Decreased	34	28	27
Steady	34	30	30

Domestic/Import Sales Mix

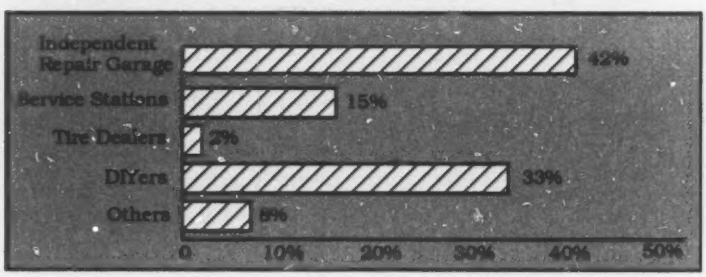
Product Performance By Region

Dollar Sales	Geographic Regions: 1	2	3	4	5	6	7	8	9
Increased	27%	20%	24%	26%	20%	29%	15%	27%	17%
Decreased	23	21	24	22	33	14	42	50	33
Steady	29	33	32	28	35	30	28	15	40

Jobber's Supplier



Product Performance By Type of Customer



Analysis:

According to ASIA's 1986 Leading Line survey, engine bearings account for 0.99% of total sales. The median annual sales volume for a jobber is $467,000. Therefore, the average jobber sells $4,623 worth of engine bearings each year.

Based on 26,636 jobbing facilities in U.S., the wholesale engine bearing market represents $123,146,219.

Regions:

Methodology:

An independent mail survey conducted by Harvey Research of Rochester, NY. Based on a random sample of 1,500 JOBBER TOPICS readers. A dollar incentive and a follow-up mailing earned a 57% return. These figures are statistically projectable within +/-3 percentage points at the 95% confidence level.

Brake Cylinders, Master Wheel

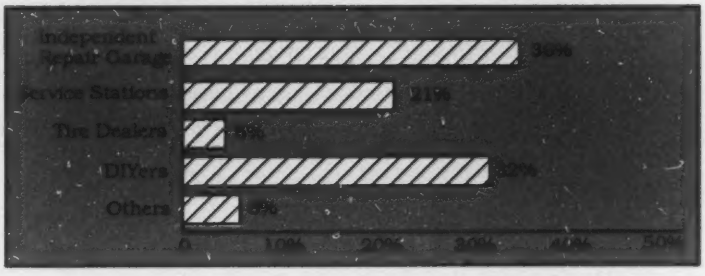
Product Performance By Sales Volume

Domestic/Import Sales Mix

Product Performance By Region

Jobber's Supplier

Product Performance By Type of Customer

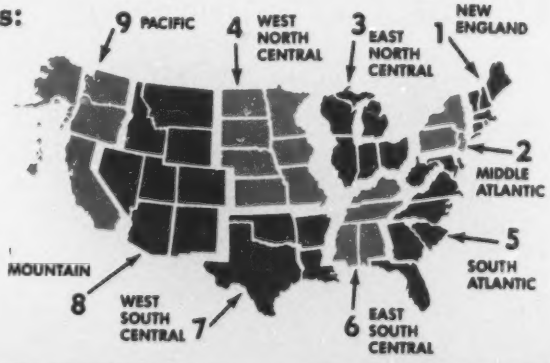


Analysis:

According to ASIA's 1986 Leading Line survey, brake cylinders account for 2.9% of total sales. The median annual sales volume for a jobber is $467,000. Therefore, the average jobber sells $13,543 worth of brake cylinders each year.

Based on 26,636 jobbing facilities in U.S., the wholesale brake cylinder market represents $360,731,348.

Regions:



Methodology:

An independent mail survey conducted by Harvey Research of Rochester, NY. Based on a random sample of 1,500 JOBBER TOPICS readers. A dollar incentive and a follow-up mailing earned a 57% return. These figures are statistically projectable within +/-3 percentage points at the 95% confidence level.

Fuel Pumps, Kits, Parts

Product Performance By Sales Volume

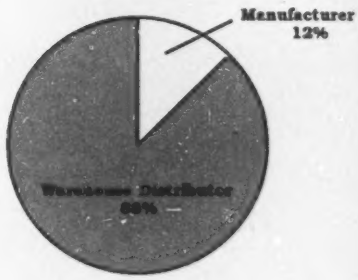
Dollar Sales	Store Sales Volume		
	Less Than $250,000	$250,000 to $650,000	$650,000 or more
Increased	31%	41%	40%
Decreased	14	12	6
Steady	43	40	42

Domestic/Import Sales Mix

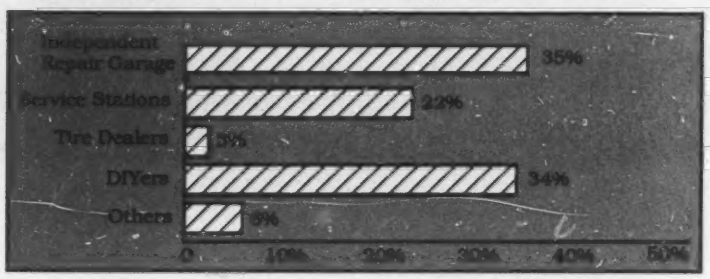
Product Performance By Region

Dollar Sales	Geographic Regions								
	1	2	3	4	5	6	7	8	9
Increased	27%	38%	30%	32%	52%	44%	37%	38%	43%
Decreased	13	5	7	10	11	9	14	31	13
Steady	47	44	48	52	31	31	42	31	43

Jobber's Supplier



Product Performance By Type of Customer

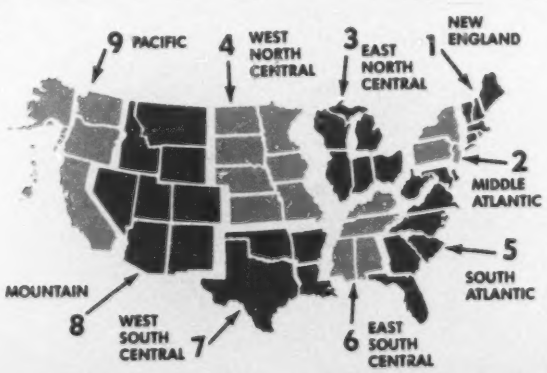


Analysis:

According to ASIA's 1986 Leading Line survey, fuel pumps, kits and parts account for 0.7% of total sales. The median annual sales volume for a jobber is $467,000. Therefore, the average jobber sells $3,269 worth of fuel pumps, kits and parts each year.

Based on 26,636 jobbing facilities in U.S., the wholesale fuel pump, kit and parts market represents $87,073,084.

Regions:



Methodology:

An independent mail survey conducted by Harvey Research of Rochester, NY. Based on a random sample of 1,500 JOBBER TOPICS readers. A dollar incentive and a follow-up mailing earned a 57% return. These figures are statistically projectable within +/-3 percentage points at the 95% confidence level.

Hand Tools (manual)

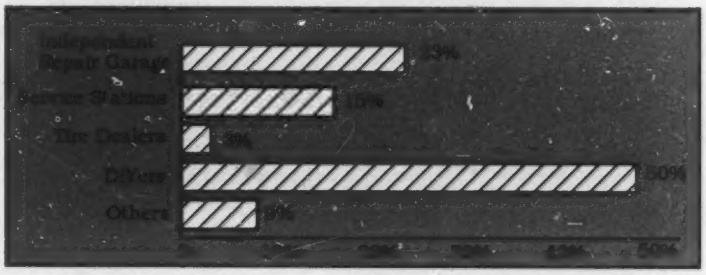
Product Performance By Sales Volume

Domestic/Import Sales Mix

Product Performance By Region

Jobber's Supplier

Product Performance By Type of Customer

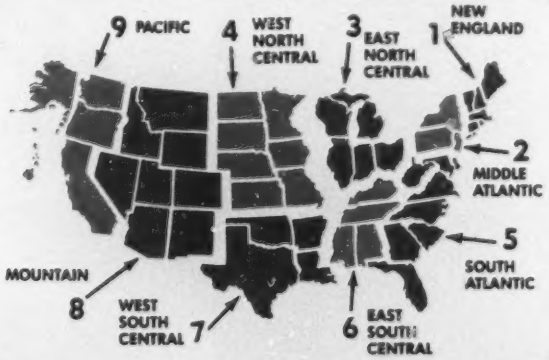


Analysis:

According to ASIA's 1986 Leading Line survey, hand tools account for 1.47% of total sales. The median annual sales volume for a jobber is $467,000. Therefore, the average jobber sells $6,865 worth of hand tools each year.

Based on 26,636 jobbing facilities in U.S., the wholesale hand tool market represents $182,853,476.

Regions:



Methodology:

An independent mail survey conducted by Harvey Research of Rochester, NY. Based on a random sample of 1,500 JOBBER TOPICS readers. A dollar incentive and a follow-up mailing earned a 57% return. These figures are statistically projectable within +/-3 percentage points at the 95% confidence level.

Motor Oil

Product Performance By Sales Volume

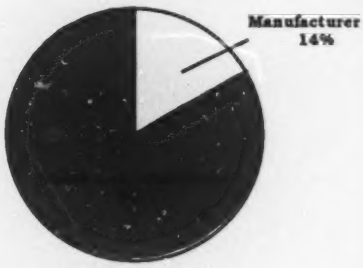
Dollar Sales	Jobber Sales Volume		
	Less Than $350,000	$350,000 to $[illegible]	$[illegible],000 or more
Increased	28%	44%	48%
Decreased	26	20	15
Steady	31	31	30

Domestic/Import Sales Mix

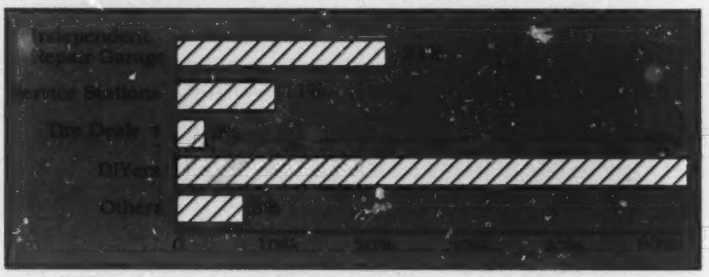
Product Performance By Region

Dollar Sales	Geographic Regions								
	1	2	3	4	5	6	7	8	9
Increased	67%	48%	32%	57%	46%	17%	38%	39%	40%
Decreased	16	21	21	16	20	[illegible]	28	19	17
Steady	17	29	29	26	33	48	31	31	33

Jobber's Supplier



Product Performance By Type of Customer

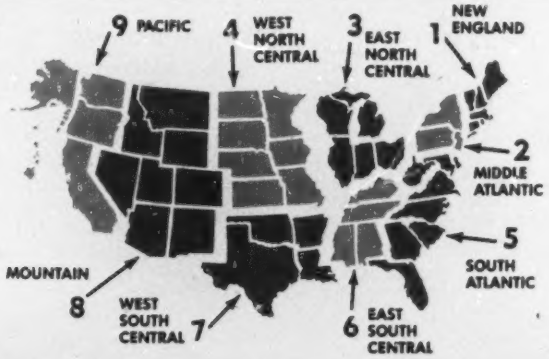


Analysis:

According to ASIA's 1986 Leading Line survey, motor oil accounts for 2.13% of total sales. The median annual sales volume for a jobber is $467,000. Therefore, the average jobber sells $9,947 worth of motor oil each year.

Based on 26,636 jobbing facilities in U.S., the wholesale motor oil market represents $264,950,956.

Regions:



Methodology:

An independent mail survey conducted by Harvey Research of Rochester, NY. Based on a random sample of 1,500 JOBBER TOPICS readers. A dollar incentive and a follow-up mailing earned a 57% return. These figures are statistically projectable within +/-3 percentage points at the 95% confidence level.

AUTOMOTIVE PRODUCT STATISTICS

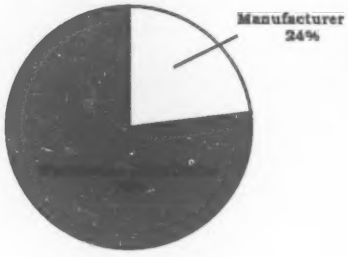
Paint, Thinners, Solvents

Product Performance By Sales Volume

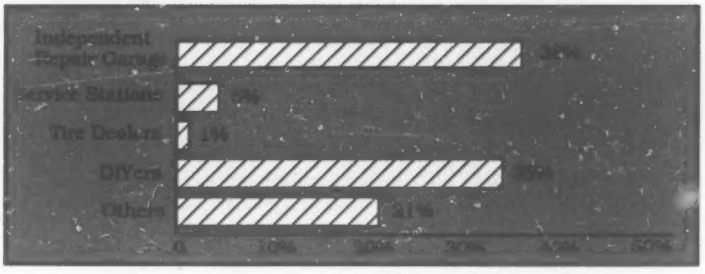
Domestic/Import Sales Mix

Product Performance By Region

Jobber's Supplier



Product Performance By Type of Customer

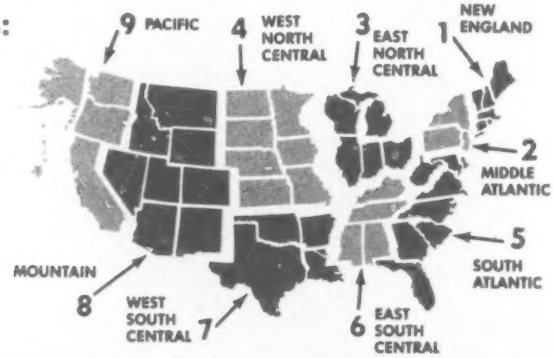


Analysis:

According to ASIA's 1986 Leading Line survey, paint, thinners and solvents account for 4.2% of total sales. The median annual sales volume for a jobber is $467,000. Therefore, the average jobber sells $19,614 worth of paint, thinners and solvents each year.

Based on 26,636 jobbing facilities in U.S., the wholesale paint, thinners and solvents market represents $522,438,504.

Regions:



Methodology:

An independent mail survey conducted by Harvey Research of Rochester, NY. Based on a random sample of 1,500 JOBBER TOPICS readers. A dollar incentive and a follow-up mailing earned a 57% return. These figures are statistically projectable within +/-3 percentage points at the 95% confidence level.

Seals (all)

Product Performance By Sales Volume

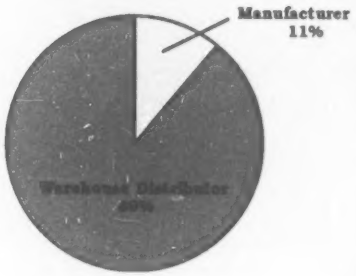
Dollar Sales	Jobber Sales Volume		
	Less Than $350,000	$350,000 to $550,000	$550,000 or more
Increased	31%	35%	47%
Decreased	12	10	8
Steady	47	46	36

Domestic/Import Sales Mix

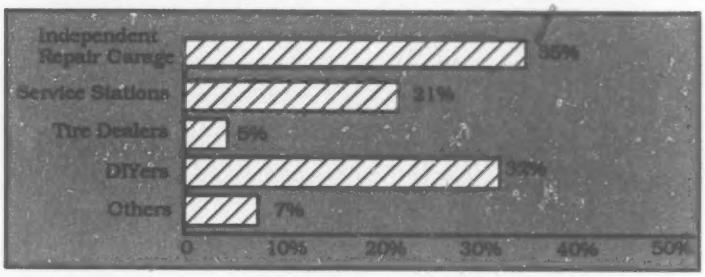
Product Performance By Region

Dollar Sales	Geographic Regions								
	1	2	3	4	5	6	7	8	9
Increased	47%	33%	27%	30%	40%	36%	33%	50%	53%
Decreased	3	11	8	7	12	5	16	15	13
Steady	33	40	51	38	43	51	43	27	30

Jobber's Supplier



Product Performance By Type of Customer

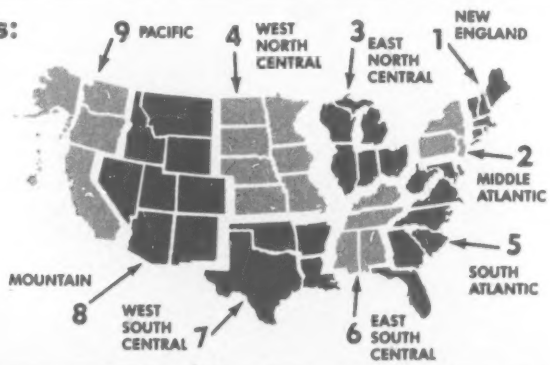


Analysis:

According to ASIA's 1986 Leading Line survey, seals accounts for 0.87% of total sales. The median annual sales volume for a jobber is $467,000. Therefore, the average jobber sells $4,063 worth of seals each year.

Based on 26,636 jobbing facilities in U.S., the wholesale seal market represents $108,219,404.

Regions:



Methodology:

An independent mail survey conducted by Harvey Research of Rochester, NY. Based on a random sample of 1,500 JOBBER TOPICS readers. A dollar incentive and a follow-up mailing earned a 57% return. These figures are statistically projectable within +/-3 percentage points at the 95% confidence level.

Starter Motors and Drives

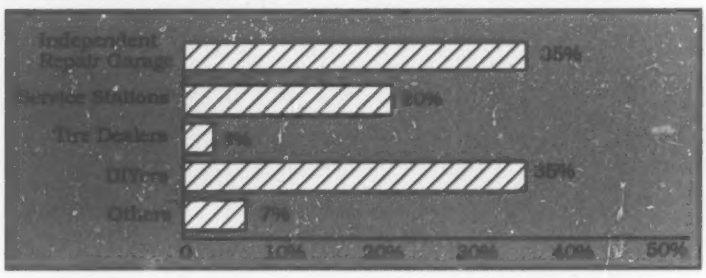
Product Performance By Sales Volume

Domestic/Import Sales Mix

Product Performance By Region

Jobber's Supplier

Product Performance By Type of Customer



Analysis:

According to ASIA's 1986 Leading Line survey, alternators, generators and starter motors account for 2.85% of total sales. The median annual sales volume for a jobber is $467,000. Therefore, the average jobber sells $13,310 worth of alternators, generators and starter motors each year.

Based on 26,636 jobbing facilities in U.S., the wholesale alternator, generator and starter motor market represents $354,511,842.

Regions:

Methodology:

An independent mail survey conducted by Harvey Research of Rochester, NY. Based on a random sample of 1,500 JOBBER TOPICS readers. A dollar incentive and a follow-up mailing earned a 57% return. These figures are statistically projectable within +/-3 percentage points at the 95% confidence level.

U-Joints and Kits

Product Performance By Sales Volume

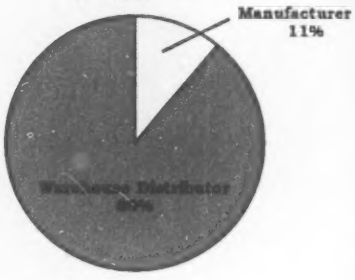
Dollar Sales	Jobber Sales Volume		
	Less Than $350,000	$350,000 to $550,000	$550,000 or more
Increased	37%	46%	47%
Decreased	11	10	11
Steady	40	38	32

Domestic/Import Sales Mix

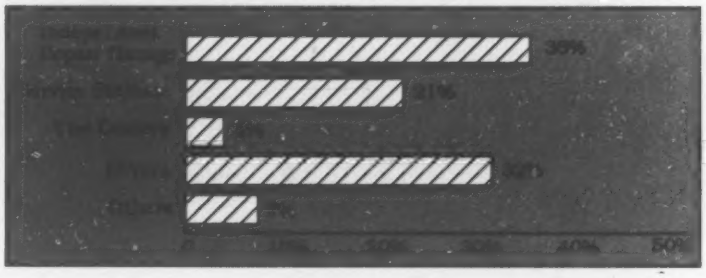
Product Performance By Region

Dollar Sales	Geographic Regions								
	1	2	3	4	5	6	7	8	9
Increased	43%	33%	41%	51%	46%	48%	42%	46%	30%
Decreased	10	11	5	7	11	12	19	15	10
Steady	33	42	40	35	37	27	35	35	53

Jobber's Supplier



Product Performance By Type of Customer



Analysis:

According to ASIA's 1986 Leading Line survey, U-joints and kits account for 0.77% of total sales. The median annual sales volume for a jobber is $467,000. Therefore, the average jobber sells $3,596 worth of U-joints and kits each year.

Based on 26,636 jobbing facilities in U.S., the wholesale U-joint and kit market represents $95,780,392.

Regions:

Methodology:

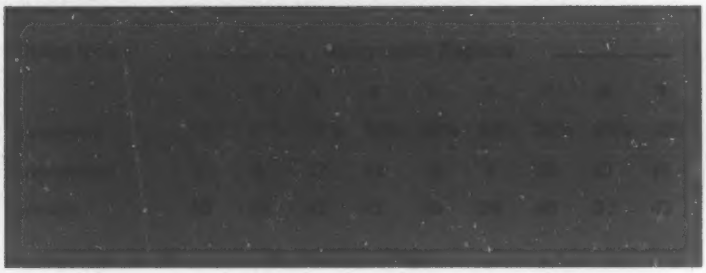
An independent mail survey conducted by Harvey Research of Rochester, NY. Based on a random sample of 1,500 JOBBER TOPICS readers. A dollar incentive and a follow-up mailing earned a 57% return. These figures are statistically projectable within +/-3 percentage points at the 95% confidence level.

Water Pumps, Parts

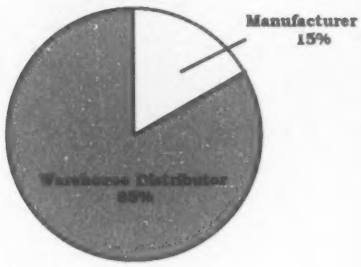
Product Performance By Sales Volume

Domestic/Import Sales Mix

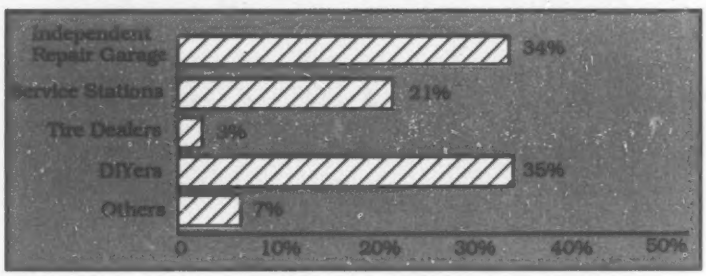
Product Performance By Region



Jobber's Supplier



Product Performance By Type of Customer

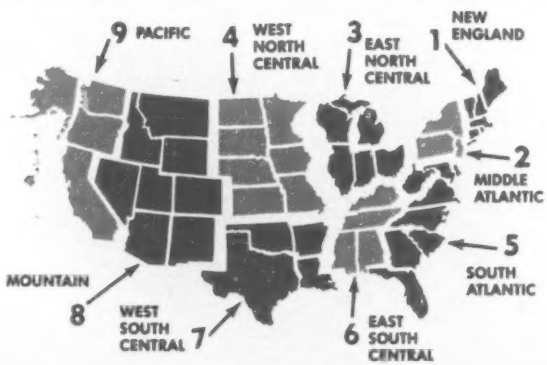


Analysis:

According to ASIA's 1986 Leading Line survey, water pumps and parts account for 1.6% of total sales. The median annual sales volume for a jobber is $467,000. Therefore, the average jobber sells $7,472 worth of water pumps and parts each year.

Based on 26,636 jobbing facilities in U.S., the wholesale water pump and parts market represents $199,024,192.

Regions:



Methodology:

An independent mail survey conducted by Harvey Research of Rochester, NY. Based on a random sample of 1,500 JOBBER TOPICS readers. A dollar incentive and a follow-up mailing earned a 57% return. These figures are statistically projectable within +/-3 percentage points at the 95% confidence level.